

ORDER ENTRY

A. Getting Started – Customer Management

After logging into the Close to My Heart Online Office, under Business Management, select *Order Entry*.

You can manage your customer database from this page by clicking the *Customer Management* link on the left side of the screen.

You may find it helpful to input everyone you think will be a customer...creating a customer database...you can use this information for making labels and will also use this Customer database to send out the FREE monthly CTMH Newsletter.

To return to the Order Entry main page, click the “Home” tab.

B. Placing Orders

At the Order Entry main page, you will see “Start a new Order” and below will be the different order types you may place with a brief description. To enter an order, click on the order type desired.

You will also see a Pending Orders box just above “Start a new order.” listing orders you have started to enter but have not yet submitted, i.e. “You have X pending orders. View Orders.” You’ll click on View Orders to see what pending orders you have in the works. All orders are automatically saved here until they are submitted. To continue working on a pending order, click on “manage”.

Use this flowchart to determine if an order should be submitted as a Gathering Order or an online order attached to an EZ Invite gathering:



C. Gathering Orders

Before beginning, make sure you know that the total sales will equal \$150 or more. If you don't have all the orders now, but know it will go over \$150 when you finalize the order, that is ok too. After clicking on *Gathering Order*, the first page you see is:

ENTER THE DATE OF THE GATHERING:

This can be today's date or whenever; however, if it's a future date you won't be able to close the order until that date arrives. The primary time this date is important is at the beginning of the month! We typically have a 5-day grace period to order from the last month's special or stamp of the month (SOM)...this is so if you have a gathering scheduled the last day of the month, the customers can still take advantage of the special/SOM and you have a few days to work with the hostess to close the gathering.

NOTE: You CANNOT double-dip in a gathering. You can only redeem specials for the month your gathering date is scheduled (i.e. you cannot get both the September and October specials/SOM in the same gathering order). If you want to "double-dip" the specials/SOM, you'll want to create an EZ Invite Online Gathering (see section E. EZ Invite Order)

Additional NOTE: The SALES count for the actual month you close/submit the order! For example, if you are closing a gathering on October 3rd for a September 30th show, you can date it September 30th, still get the September special/SOM, but the sales count towards October sales.

This is ***CRITICAL***, when it's the end-of-quarter and you're trying to meet your \$300 sales goals...***the sales count for the day the orders are placed (note it's based on CTMH local time (MST))***. Only the specials have a grace period. On the flip side, if you know you've already met your sales goals, you could wait until October 1st (up to 5th) and place the order to get the September Special and have it count towards your next month/quarter sales. (**Caution:** read the FAQs for each campaign to confirm if there is a grace period for that specific special!)

ADD CUSTOMERS:

If you have customers in your customer database, you can select them by typing in a few letters and it'll start giving you options to select from your database, click on the customer and they will be added to the gathering.

Click "Create New" to add a new customer by simply typing the First & Last Name into the text box. You'll want to update your Customer Management database with the customers email to ensure they receive the newsletter, but for Order Entry purposes, this is a quick way to add customers to a gathering. Once you've added all the customers to the gathering, click SELECT A HOSTESS.

SELECT A HOSTESS:

Select one of the customers that have been added to the order to be the Hostess. You can be the Hostess!!

SELECT A SHIPPING LOCATION:

It will automatically select shipping to you the consultant. You can change it to the hostess or to a Customer and make the address wherever you want the gathering shipped to.

SELECT A SHIPPING METHOD:

Personally, I recommend only going with FedEx Ground (\$7.95 or 7.95%). Any other option is just so much more expensive and may only be slightly quicker. Waste of money! If you ever need something right away and can't wait for the order to arrive, contact me...I'll likely have it in stock and can get it to you quicker and you can just ship me a replacement item(s).

CTMH Rush Fee: NEVER, EVER pay this!!! Waste of money!! This just means CTMH will pack the order first thing...but it doesn't mean Fedex ships it any quicker! Additionally, if you place an order for \$1000 or more, **your order is automatically expedited FREE!!** Shipping time will be determined by where the address is compared to Salt Lake City, Utah.

CONFIRM ORDER SETUP:

This screen just gives you a summary of all the information you've input so far; review, then click ADD ITEMS TO ORDER.

ADD ITEMS TO ORDER:

This screen will list each of the customers you included in the gathering, along with a summary of the quantity of items ordered and the subtotal. To add items to each person, select "add items" next to each person's name. The system will not allow you to proceed with a customer who does not have items ordered (to ensure you don't accidentally forget to add a customer's order). If they end up not ordering, you'll have to go back to SETUP ORDER and remove the customer from the gathering.

ADD ITEMS:

When you select "add items", it brings up the customer's name up top and has 3 areas to enter products:

A. Enter Regular Priced Items

This is where the majority of your order entry will be conducted. Once you've entered the items, you can click "Add to order" and you can review all the Current Items for the Customer by scrolling to the bottom of the screen. NOTE: If the customer is eligible to purchase a discounted Stamp of the Month (SOM) or another special, it will appear in a text box at the bottom of the screen. Add those items as appropriate then select Add Items To Another Customer's Order. This will return you to the Add Items to a Customer's Order screen. Repeat until all customer orders have been input.

NOTE: Items on the Supply/Bulk Items list can be placed on a gathering order under the (Consultants) name. While the Supply items are NOT commissionable, bulk items listed on the Supply/Bulk Items list ARE commissionable and will earn the 22% discount as well as have it apply towards earning hostess rewards. Non-Commissionable Supply items will be annotated with an * next to them, these items do NOT count towards your personal sales.

B. Enter Discounted Stamp of the Month items or discounted Constant Campaign items

NOT USED: Typically not used; instead, when you're done entering the persons order, the system will automatically pop up with a block at the very bottom of the page letting you know this person qualifies for X number of promotional items & you can add them then.

C. Enter Free Stamp of the Month items or Free Constant Campaign items

NOT USED: Typically not used; instead, when you're done entering all of the persons order, the system will automatically pop up with a block at the very bottom of the page letting you know this person qualifies for X number of promotional items & you can add them then.

For **Constant Campaign and Stamp of the Month items**, the system will notify you of how many you qualify for. Click "Add to Order", but it will only add one (1) at a time, you'll need to continue clicking "Add to Order" until you've added the quantity you were looking for (up to the number qualified). The system does not automatically add these items as you do pay for them (and for the free items, you pay tax/shipping for them, so they don't automatically add them.)

Note, Bang for Your BUCK: Before moving on to select Add Hostess Rewards, confirm your overall Commissionable Subtotal (or EZ Invite Subtotal if you're closing an EZ Invite gathering), noting Hostess Rewards levels. Refer to the Hostess Rewards Chart so you don't miss the next level of hostess rewards by only a few dollars, you don't want to close a gathering at \$340 in sales, when for \$10 more you would have received \$20 more in hostess rewards!!

HOSTESS REWARDS

WHEN YOUR ORDER TOTAL REACHES:	REWARD YOURSELF WITH SELECTED CLOSE TO MY HEART PRODUCTS*:	AND RECEIVE 50% OFF:
\$150 – \$249	\$25 in free products	
\$250 – \$349	\$40 in free products	1 current Idea Book item
\$350 – \$449	\$60 in free products	1 current Idea Book item
\$450 – \$549	\$80 in free products	2 current Idea Book items
\$550 – \$649	\$100 in free products	2 current Idea Book items
\$650 – \$749	\$120 in free products	3 current Idea Book items
\$750 – \$849	\$140 in free products	3 current Idea Book items
\$850 – \$949	\$160 in free products	4 current Idea Book items
\$950 – \$1,049	\$180 in free products	4 current Idea Book items
\$1,050 or more	\$200 or more** in free products	4 current Idea Book items

Note, MORE Bang for Your BUCK: Also, be aware of your monthly personal sales when you're closing a gathering and ensure you don't miss a sweet spot on the compensation plan! You don't want to end the month at \$398 when you could have added \$2 to the order and earned an extra \$20 in SPC (Select Product Credit), or end your month at \$942 when for \$58 more you would receive an extra 8% commission (which is \$80 in your commission check!!)

Monthly Personal Sales	Base Commission	Override Commission	SPC Commission	Total Commission
\$150-\$399.99	22%	-	\$5	22% + \$5 SPC
\$400-\$599.99	22%	-	\$25	22%+\$25 SPC
\$600-\$799.99	22%	-	\$50	22% + \$50 SPC
\$800-\$999.99	22%	-	\$75	22% + \$75 SPC
\$1,000 - \$1,999.99	22%	8%	\$75	30% + \$75 SPC
\$2,000 - \$2,999.99	22%	11%	\$75	33% + \$75 SPC
\$3,000+	22%	13%	\$75	35% + \$75 SPC

ADD HOSTESS REWARDS:

At the top in blue text you'll see a balance of how many hostess rewards have been earned:

Noreen Petty has a hostess rewards balance of \$40.00 and a Hostess Rewards Plus balance of 1 50% off items.

Ensure your hostess rewards balance is ZERO (or as close to) before submitting the order. If you submit without redeeming your hostess or half-price items, they will be lost to you/your hostess! Also, you are allowed to pay a hostess overage; however, note that you'll pay shipping on the overage (if you're only redeeming hostess rewards for an EZ Invite party and no other items are being ordered, you DO NOT want to have an overage, as you'll pay the full \$7.95 shipping for that \$.90 overage. Also, don't let the overage be too high (no more than \$1-2...those dollars could be sales and trip points!) At the bottom of the page you can see the Hostess Rewards Overage so you know how far over it is, plus a full summary of the Hostesses Order.

NOTE: Hostess rewards and half-price items do NOT carryover! They must be redeemed when the gathering is closed/submitted or they will be lost!

URGENT, IMPORTANT, HOT Note: Half-Priced items do NOT count towards your personal sales! So a \$250 gathering with a \$50 half-priced cricut does NOT put you at \$300 in sales to meet your quarterly sales goal!! ONLY the Commissionable Sales count for your sales requirements, not supply items or half-priced hostess items!

- A. Enter Select Product Credit Items
- B. Enter Hostess Rewards Plus! Items

Section A is for your rewards balance while section B is for your 50% off items. Be sure you're redeeming your hostess rewards with qualifying products (they are described/listed in this section). Your 50% off item can be any current product.

Once you've redeemed the Hostess Rewards and Hostess Rewards Plus! items, you have two options available: "Redeem Consultant SPC" "View Order Summary"

REDEEM CONSULTANT SPC:

You will have the option to redeem qualifying select product credit using the SPC credit available to you. Refer to the FAQs on Select Product Credit Redemption for additional details: Online Office > Corporate Communications > FAQs > under Training > Select Product Credit FAQ

When you enter this screen, the system will show your SPC balance:
"You currently have \$xx.xx in select product credit."

You can then add the product item numbers and quantities for the SPC items you'd like to redeem. Note: Based on your gathering order, you can receive FREE shipping on SPC redemption items. Refer to the FAQs for the specific levels required for free shipping.

When you're done adding Select Product Credit redemption items, click "View Order Summary"

VIEW FINAL ITEMIZED SUMMARY FOR THIS ORDER:

This will give you a full review of where the gathering is shipping to, the customer's subtotals, tax, shipping and full totals for each person. Followed by a full summary of the order.

In the order summary, take note of the section:

22% Consultant Discount

- Now – I'm paying with my card(s)
- Later – I'm paying with customer cards

You can input customer credit cards for payment, allowing you to accept credit cards from your customers without having to pay any processing fees. CTMH will absorb all credit card processing fees! When selecting "Later – I'm paying with customer cards" you'll be able to input your customers credit card information and they will be charged the full balance you put on their card, up to their order amount. Please note that you will receive your 22% commission on the entire gathering in your commission check, vs getting the 22% discount now.

SELECT PAYMENT TYPE:

Input your first payment method. If you have a credit card on file, you can select the down arrow in the Payment Method: box next to credit card to see your saved payments available to you.

Select the card type and provide all the information for this payment. Click SAVE.

If paying with more than one card, select "Add New Payment" to add an additional payment method. Ensure all payment methods add up to the full order total (Order Balance should reflect \$0.00). Click Confirm Payment Information.

SUBMIT PAYMENT FOR THIS ORDER:

This is your last screen, so verify the shipping information is correct and payment is taken care of. Once you click "Submit Order", it's a done deal! No corrections, changes or additions. Once you've clicked "Submit Order", don't re-click or try to go back, it may inadvertently submit twice.

D. Individual Orders

Placing individual orders is virtually the same process as placing a Gathering order with the following exceptions:

- You will not select a hostess.
- There will be no Hostess Rewards offered.
- You do not have to list customers' names on the order. Your name appears by default and you can choose to order all items under your name if desired. If you do add customers and also want to order items for yourself, you must add yourself as a customer as well.

I NEVER recommend ordering as an individual order!! You're leaving benefits/money on the table using this option...all orders should be placed in such a way as to ensure you receive Hostess Rewards!!! If for some reason your order will not reach \$150+, then instead create an EZ Invite Gathering (see below) then place the individual order via your OBA shopping website. This will allow the order to count towards a gathering, ship directly/immediately and give you 30-days to accumulate additional orders to create a gathering total that earns hostess rewards.

E. EZ Invite Order

EZ Invite is a gathering order that enables online ordering for customers/guests on your Online Business Address (OBA)! You have two options, an EZ Invite Home Gathering or an EZ Invite Online Gathering. The main difference between the two types is the invitation will be worded differently to guests, letting them know if it's an actual gathering at someone's home, versus an online gathering to shop from. (You can read the Frequently Asked Questions on the CTMH website: [Online Office > Corporate Communications > FAQs > under Online Resources > EZ Invites FAQ](#))

CREATE an EZ Invite:

Click EZ Invite Order

Choose either EZ Invite Online or Home Gathering

- For Gathering Name, type any name: "My Party" (this is what it will say on your OBA)
- Select the end date for the Gathering Date (most is 30 days out)
- Ensure "Publish on my OBA" is checked (this will allow it to appear on your OBA)
- For an online gathering, leave default gathering time of 11:59; for a Home Gathering, select the time of the gathering.

Click Select a Hostess

- Type the name of your hostess (or yourself if it will be you)
- Once the Hostess is selected, it'll populate with their information from the customer database

Click Select a Color Scheme for your emails

- Choose any color, this will just be the color of the emails you send/receive...no biggie

Click Send a Personalized Confirmation to Your Hostess

- You can choose to add a personal message to your hostess

Click Send Personalized Message

Your hostess will receive an e-mail and the party should now appear on your OBA

NOTE: Customers are able to order online and pay via credit card with their order shipping immediately and directly to them (it doesn't wait until the party closes, it ships right away when the order is placed)...you don't pay processing fees...you earn the sales credit and will receive your commission on the 15th of the following month! Quick and easy, with no cost to you!!!

BONUS: I recommend that you **always have 1 EZ Invite gathering open on your OBA** at all times! When a customer shops your OBA (website), they will automatically be JOINED to an online gathering earning hostess rewards!! What does this mean for you? EVERY month you should create an EZ Invite Online party so when a customer places an order on your site, it will be connected to the party and earn hostess rewards! (NOTE: if you have 2 online parties, the order will not be connected to either since the system won't know which gathering it should connect to...so, if possible, only create 1 EZ Invite party each month!) (Bonus Note: If an order is placed and NOT joined to your EZ Invite party, you can email corporate and they can manually link an online order to your EZ Invite so that it counts towards the rewards!)

The hostess will receive the confirmation email: Subject: Thank You for Hosting a Close to My Heart Online Gathering! From this email, the hostess can click "Go to My EZ Invite Manager" and invite friends and family, or can just direct them to your OBA and have them JOIN the party and begin shopping directly!

CLOSING an EZ Invite Party and REDEEMING Hostess Rewards:

Click "Order Entry" under the Business Management Column

- "You have X pending orders. View Orders" Click View Orders
This will show any open gatherings/orders you have started.
- Click "Reporter" to view the details of your EZ Invite party, current party sales, who ordered, etc (Click "Return to Order Entry" to go back)
- Click "Manage" to open your EZ Invite party
- Refer to section C. Gathering Orders beginning on page 2 of these instructions for detailed steps for closing your party and redeeming the Hostess Rewards

DON'T END YOUR MONTH JUST BELOW A HAPPY SPOT!

STRETCH FOR THE EXTRA REWARD!

\$300 \$5 SPC + TEAM INCENTIVE	\$400 \$25 SPC + TEAM INCENTIVE	\$600 \$50 SPC + TEAM INCENTIVE	\$800 \$75 SPC + TEAM INCENTIVE	\$1000 \$75 SPC + 8Z OR \$80 CASH + TEAM INCENTIVE	\$2000 \$75 SPC + 17Z OR \$220 CASH + TEAM INCENTIVE	\$3000 \$75 SPC + 23Z OR \$390 CASH + TEAM INCENTIVE
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SCRAPPIN' CHATTERS TEAM