NSA VIRTUAL OFFICE QUICK TIPS

Address Book – Add Customers
- My Customers > Customer Search & Follow-Up
- Run Report > Add to Address Book
- Select Names > Add to Address Book

Address Book – Add Distributors
- My Team Data > Search My Team
- Run Report > Add to Address Book
- Select Names > Add to Address Book

Address Book – Add Prospects
- My Prospects > Add Prospect
- Fill in form > Save

Address Book – Import Contact from Outside Source
- Personal File > Address Book
- Import Contacts > Select Program
- Follow Program Export Instructions
- Select Saved Export File for Step 2 > Next
- Mark Contact Info > Import

Customer Info Edits – Change Shipment
- My Customers > Edit Customer Account
- Enter Info > Process Search > Select Order

Customer Orders
- My Customers > Submit Customer Order
- Select Product > Check Out
- Enter Info or Add from Address Book

E-Cards
- My Personal File > E-Cards
- Select e-card
- Personalize > Next
- Preview e-card > Next
- Select e-mail addresses > Send e-card

E-mail
- Personal File > Compose e-mail
- Compose > Send
- (use BCC for more than one recipient)

Events – Search

- Event > Events Schedule
- Select Search Criteria > Continue
- Click View Detail
- Save to Calendar or e-mail event details

Follow-Up Scheduling

- My Prospects > Prospect Follow-up
- Select Prospect > Follow-up button
- Fill in form > Save
  (Time=Calendar / No Time=Task)
  Daily reminders appear on your Home Page Calendar

Identify "Raving Fans"

- My Customers > Customer Search and Follow-up
- Click on Advanced Search
- Select Criteria > Run Report

List Creation

- Personal File > Address Book
- Manage Lists > Fill in Create New List Names
- Select Names > Add to Address Book

My Business At-A-Glance

- My Team Data > Manage My Team
- My Business at-a-glance
- My Current Month vs. My Previous Month

New Distributor Sign-Up

- My Team Data > Add New Distributor
- Complete Personal Information
- Complete Sponsor Information
- Check Appropriate Starter Kit Box
- Check "Accept" Boxes
- Complete Payment Type
- Click Submit

New Preferred Customer Alerts

- Home Page
- My Alerts
- Click on Alert (You have X new customers)

Organizational Chart

- My Team Data > Team Development
- Organizational Chart
- Select Criteria > Show Report

To see a Team Member's organizational chart

- Click Make Top
- View Detail – to see this Team Member's Manage My Team page

Pay Statement

- Personal File > Personal Profile > My Earnings Statement
- Select format to view statement
- Confirm e-mail address
- Select Statement date to view in drop-down menu
- Click Process Request

Personal Information – Edit

- Personal File > Personal Profile > Edit Personal Information
- Update Information
- Click Update

Personalized Juice Plus+® website

- Personal File > Personal Profile > My juiceplus.com
- Complete Personal Information
- Select website design
- Click Generate Home Page

Prevention Plus+ Conference Calls

- Tools > Juice Plus+® Materials > Prevention Plus+ Conference Calls

Promote a Team Member

- My Team Data > Promote a Distributor
- Complete Required Information
- Submit

Report Help

- My Team Data > Any Report (see above list)
- Click Help Icon (next to Report Name)
- Customize Output Information on Report
- My Team Data > Any Report (see above list)
- Click Format (bottom of Report Page)
- Select Items to View on Your Report
- Click Return to Next Step
- Select Criteria
- Run Report

Reports – How to Save

- My Team Data > Any Report
- Customize Format (see above)
- Customize Criteria
- Save Report
  Saved Reports are saved to:
  My Team Data > Manage My Team > Reports

Research Summary

- Tools > Juice Plus+® Materials
- Brochures and Publications
- Create Personalized Research Summary (left column)

Time Zone for Virtual Office

- Personal File > Calendar
- My Settings > Time Zone > Save Options

Tracking Exposures in your Address Book

- Personal File > Address Book
- Search > Customers (drop-down menu)
- Click icon for Edit or View Contact Details
- Type in Reference Note > Save Reference Note
- Click Save or Save and Schedule a Follow-up

  (Follow-ups scheduled from your Address Book will appear on your calendar as either Tasks or Appointments)

Training Calls: Virtual Franchise® Owner's Manual

- Training > Training Calls

Voicecom Numbers

- My Team Data > Voicecom Analysis
- Select Criteria
- Click Run Report

Wellness Presentation Support Material

- Training > Presentations

Year-to-date Graphs

- My Team Data > Manage My Team
- Year-to-date Graphs:

  My New Distributors
  Earnings Amount
  My Team's New Customers
  Total Payline PVC