

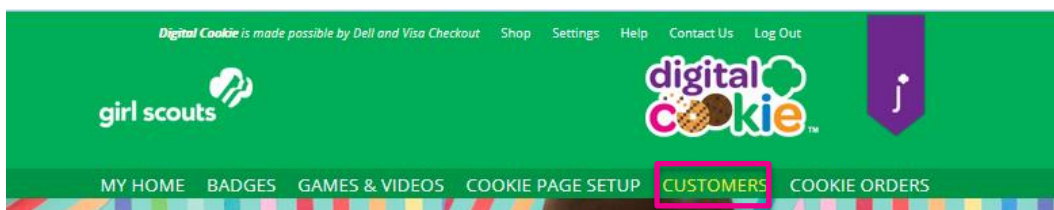
Marketing to Customers

A Digital Cookie site isn't any good without customers! Learn how you can:

- Enter customer information
- Send marketing emails

1

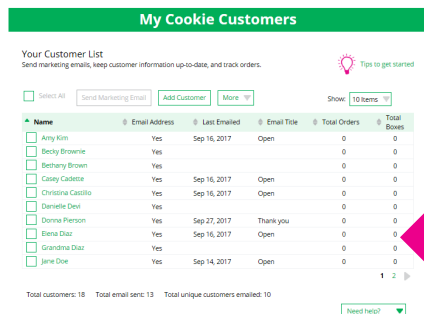
On the Digital Cookie dashboard, click the “Customers” tab.



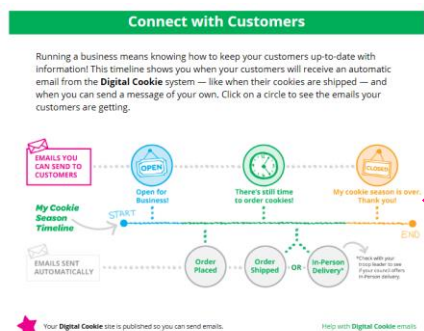
2

The Customers page is broken into two section -

- “My Cookie Customers” for entering customer lists
- “Connect with Customers” to learn more about marketing to customers



My Cookie
Customers



Connect
with
Customers

3

My Cookie Customers

Girls can add or import customers they want to send marketing emails to - and keep all of their customers in DOC for referencing in future cookie seasons.

My Cookie Customers

Your Customer List
Send marketing emails, keep customer information up-to-date, and track orders.

☐ Select All Show: 10 Items

Name	Email Address	Last Emailed	Email Title	Total Orders	Total Boxes
<input type="checkbox"/> Amy Kim	Yes	Sep 16, 2017	Open	0	0
<input type="checkbox"/> Becky Brownie	Yes			0	0
<input type="checkbox"/> Bethany Brown	Yes			0	0
<input type="checkbox"/> Casey Cadette	Yes	Sep 16, 2017	Open	0	0
<input type="checkbox"/> Christina Castillo	Yes	Sep 16, 2017	Open	0	0
<input type="checkbox"/> Danielle Devi	Yes			0	0
<input type="checkbox"/> Donna Pierson	Yes	Sep 27, 2017	Thank you	0	0
<input type="checkbox"/> Elena Diaz	Yes	Sep 16, 2017	Open	0	0
<input type="checkbox"/> Grandma Diaz	Yes			0	0
<input type="checkbox"/> Jane Doe	Yes	Sep 14, 2017	Open	0	0

Total customers: 18 Total email sent: 13 Total unique customers emailed: 10

Clicking on a customer's name brings up more information about the customer, including details about any past orders.

Customer Information





< Back to customer list

First Name: Suzie Last Name: Greenburg
 Street Address: 123 Anywhere St City: Coral Gables
 State: Florida Zip Code: 12334
 Phone: (123) 455-6788 Contacted: No
 Email: hlav@girlscouts.org Notes:
 Contact Source: Website

Online Cookie Sales

Number of online cookie orders: 1

Order Type: Shipped by Mail with Donation Transaction Type: My Cookie Site
 Order Date & Time: 10/05/16 12:13 PM EDT Order Number: 05004714 Order Status: Pending Shipping

 Do-si-dos, 1 box	Purchased Boxes: 4 \$16.00
 Samoas, 1 box	Donated Boxes: 4 \$16.00
 Tagalongs, 1 box	Subtotal: \$32.00
 Treats, 1 box	Shipping & Handling: \$9.95
	Order Total: \$41.95

3a Send Marketing Emails

To send emails to your customers, simply check the box in front of all the customers you want to reach, then click “Send Marketing Emails.”

My Cookie Customers

Your Customer List
Send marketing emails, keep customer information up-to-date

☐ Select All **Send Marketing Email** **Send Marketing Emails**

Show: 10 Items

Name	Email Address	Last Emailed	Email Title	Total Orders	Total Boxes
<input checked="" type="checkbox"/> Amy Kim	Yes	Sep 16, 2017	Open	0	0
<input type="checkbox"/> Becky Brownie	Yes			0	0
<input type="checkbox"/> Bethany Brown	Yes			0	0
<input type="checkbox"/> Casey Cadette	Yes	Sep 16, 2017	Open	0	0
<input checked="" type="checkbox"/> Christina Castillo	Yes	Sep 16, 2017	Open	0	0
<input type="checkbox"/> Danielle Devi	Yes			0	0
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<input type="checkbox"/> Grandma Diaz	Yes			0	0
<input checked="" type="checkbox"/> Jane Doe	Yes	Sep 14, 2017	Open	0	0

Total customers: 18 Total email sent: 13 Total unique customers emailed: 10

Need help?

Next, select which of the three emails you would like to send at this time: “Open for business,” “There’s still time to order cookies,” or “Thanks for your support.”

To find out more about each of those emails and see a preview, go to the “Connect with Customers” section.


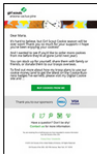
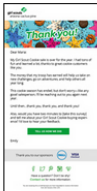
Send Marketing Email

To: Bob Smith; Bob Smith 11; Bob Smith 11; Bob Smith 14; Bob Smith 8;

Note: One or more of the customers you selected didn't have an email address on file.

Select the email you would like to send:

☒ Open for business ☐ There's still time to order cookies! ☐ Thanks for your support

A full view of each email can be seen in the communication section

Send Email **CANCEL**

You can select different customers and send different emails to them, or send the same email to all your customers at the same time.

When you have made your selection, check the box next to the email you are going to send and then click “Send Email” at the bottom.

3b Add Customer

To add customers manually (instead of importing), click the “Add Customers” button and you will get a screen like this for entering information.

Add Customer

[< Back to customer list](#)

required *

First Name:

Last Name:

Email:

Address:

City:

State:

Zip Code:

Phone:

Notes:

The only required field is name. However, to maximize your marketing, you should complete as many of the fields as possible.

When you are finished entering information, click “Add Customer”. The customer information will be stored.

3c Delete Customer

We recommend keeping customer lists from year to year, but there may be times when you will need to delete one or more. To do that, select the box in front of the customer(s) you want to delete, then click on the “more” dropdown menu and select “Delete Customer”.

You will get a pop-up warning that deletion is permanent and confirming how many customers you are attempting to delete. To continue with deletion, click “yes”

Delete Customer

You want to delete 1 name from your customer list.
If deleted, this cannot be undone.

3d Import

Clicking on the “More” drop down menu gives you the option to import a customer list.

The screen has instructions on how to import contacts. It also includes the template that you will need for importing. The template is on the second tab in the spreadsheet, titled “Import_Customer.”

	A	B	C	D	E	F	G	H	I	J
1	First Name	Last Name	Street Address	City	State	Zipcode	Phone Number	Contacted	Email Address	Notes
2	Juliette	Low	123 Anywhere St	Savannah	GA	12345			realGI@test.com	Loves Savannah Smiles
3										
4										
5										
6										

Import a List of Customer Names

You can take a copy of information you have in one program and use it in another program. When you do this, you are importing a file from one place to another.

Steps to import a customer list into Digital Cookie

1. Download our [Cookie Customers Template](#). There are helpful instructions in the file.
2. Type the names of customers who would like cookies into the file. Include their email addresses so you can send them a cookie marketing email. Remember to save the file.
3. When you have finished putting in the names of your customers, select "Import file."

Choose File

Cancel

Import file

When the list is prepared and saved, use the “Choose File” button to select your file from where you saved it. Then click the green “Import File” button at the bottom. When it has successfully imported you can send marketing emails to those customers.

3e Export

The “More” drop down menu also gives you the option to export your customer list. When you choose “Export” a screen will pop up with instructions on how to export your customer list and save it to your computer.

Simply click the green “Export File” button and you will be asked where you want to save the file on your computer.

Export Your Customer List

Saving a copy of your customer list is easy. When you select the "Export file" button, a file will download to your computer with the name "DigitalCookieCustomers". You can rename the file, if you wish, and save it on your computer.

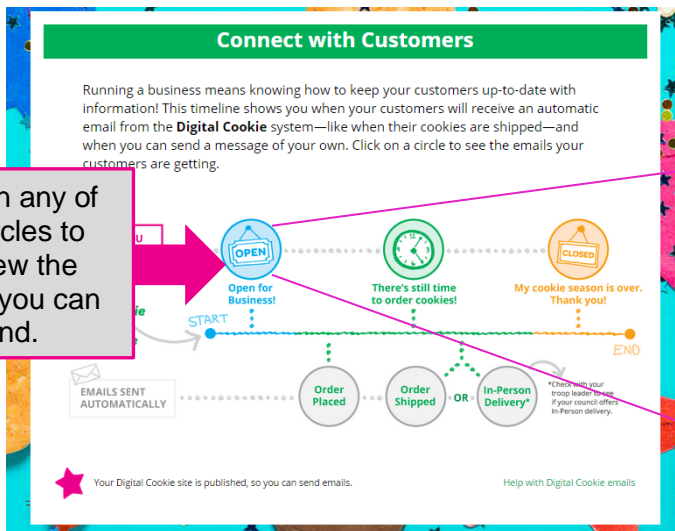
Cancel

Export file

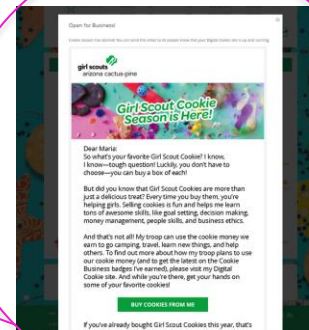
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Connect with Customers

Learning about marketing to your cookie customers is a great skill that can increase cookie sales. In this section you can see the three different emails to send to your customers - and get suggestions for when to use them.

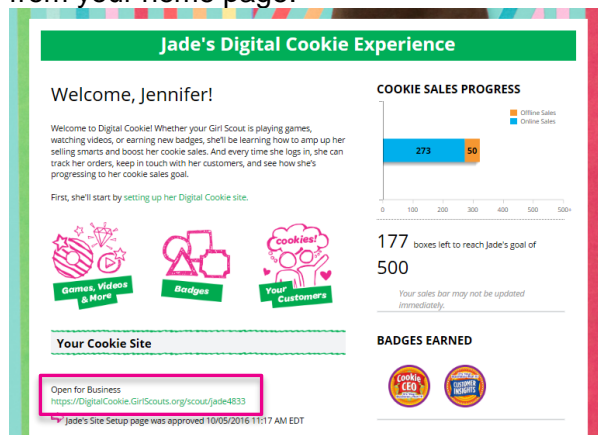


Preview of "Open for Business" email



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You can also send customers a link to your Digital Cookie Website directly from your home page.



Customers who purchase directly from a link won't be reflected accurately in your customer list and won't count as an email sent in your totals. But their orders are treated the same no matter how they reached your website.