

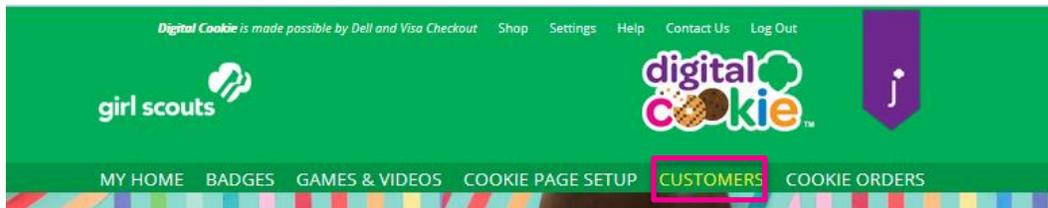
## Marketing to Customers

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 sections -

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

**My Cookie Customers**

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

Select All | Send Marketing Email | Add Customer | More | 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 Browne       |               | Yes              |             | 0            | 0           |
| <input type="checkbox"/> Bethany Brown      |               | Yes              |             | 0            | 0           |
| <input type="checkbox"/> Casey Cadotte      |               | Yes Sep 16, 2017 | Open        | 0            | 0           |
| <input type="checkbox"/> Christina Castillo |               | Yes Sep 16, 2017 | Open        | 0            | 0           |
| <input type="checkbox"/> Danielle Devl      |               | Yes              |             | 0            | 0           |
| <input type="checkbox"/> Danna Peterson     |               | Yes Sep 27, 2017 | Thank you   | 0            | 0           |
| <input type="checkbox"/> Elena Diaz         |               | Yes Sep 16, 2017 | Open        | 0            | 0           |
| <input type="checkbox"/> Grandna 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

Need help?

My Cookie Customers

**Connect with Customers**

Running a business means knowing how to keep your customers up-to-date with information! This timeline shows you when your customers will receive an automatic email from the Digital Cookie system — like when their cookies are shipped — and when you can send a message of your own. Click on a circle to see the emails your customers are getting.

EMAILS YOU CAN SEND TO CUSTOMERS

EMAILS SENT AUTOMATICALLY

Your Digital Cookie site is published so you can send emails. Help with Digital Cookie emails.

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. [Tips to get started](#)

Select All  Send Marketing Email  **Add Customer**  More  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           | Sep 27, 2017 | Thank you   | 0            | 0           |
| <input type="checkbox"/> Donna Pierson      | Yes           | Sep 16, 2017 | Open        | 0            | 0           |
| <input type="checkbox"/> Elena Diaz         | Yes           | Sep 14, 2017 | Open        | 0            | 0           |
| <input type="checkbox"/> Grandma Diaz       | Yes           |              |             | 0            | 0           |
| <input type="checkbox"/> Jane Doe           | Yes           |              |             | 0            | 0           |

Total customers: 18 Total email sent: 13 Total unique customers emailed: 10 [Need help?](#)

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:** hlaw@girlscouts.org **Notes:**  
**Contact Source:** Website

[Edit Customer](#) [Delete Customer](#)

**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-gi-dos, 1 box | Purchased Boxes:     | 4 | \$16.00 |
| Samoas, 1 box    | Donated Boxes:       | 4 | \$16.00 |
| Tagalongs, 1 box | Subtotal:            |   | \$32.00 |
| Trefolis, 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 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 Gadgette                | 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           |
| <input checked="" type="checkbox"/> Donna Pierson      | Yes           | Sep 27, 2017 | Thank you   | 0            | 0           |
| <input checked="" type="checkbox"/> Elena Diaz         | Yes           | Sep 16, 2017 | Open        | 0            | 0           |
| <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 1; 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

[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   |              |           | realIGI@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

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.

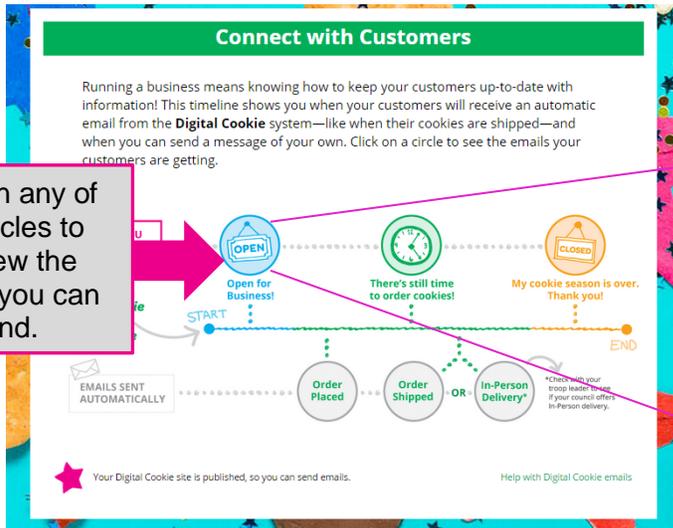
#### Export Your Customer List

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.

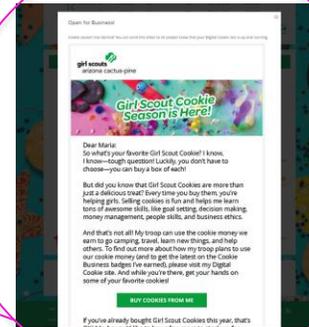
4

**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



Click on any of the circles to preview the emails you can send.

5

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.