

Digital Cookie[®]

Marketing to Customers

A Digital Cookie site isn't any good without customers! Learn how you can enter customer information and send marketing emails below.

Step 1: On the Digital Cookie dashboard, click the Customers tab.

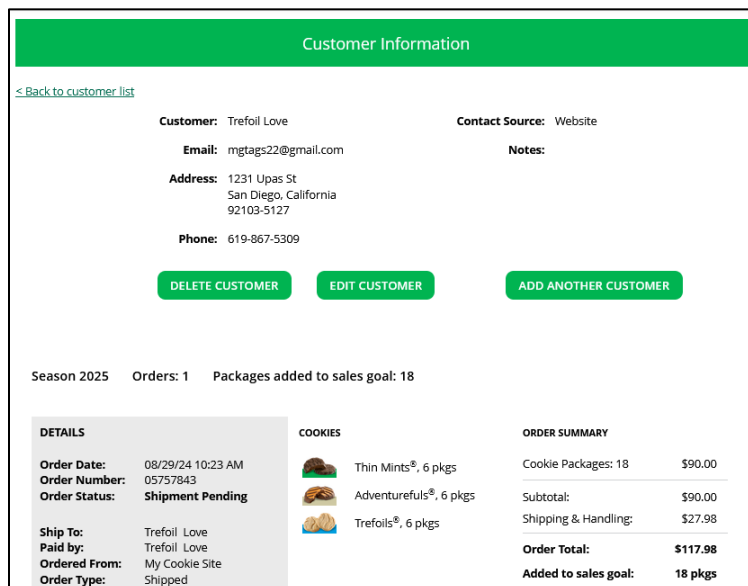
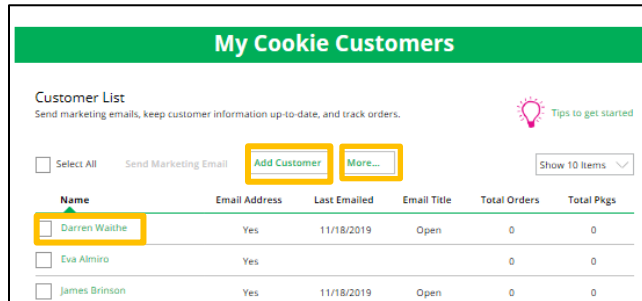


Step 2: The Customers page is broken into two sections

- My Cookie Customers, for managing your customers
- Connect with Customers, to learn more about marketing to customers

Step 3: My Cookie Customers

Girl Scouts can add or import customers they want to send marketing emails to - and keep all of their customers in Digital Cookie for referencing in future cookie seasons. Clicking on a customer's name brings up more information about the customer, including details about any orders.

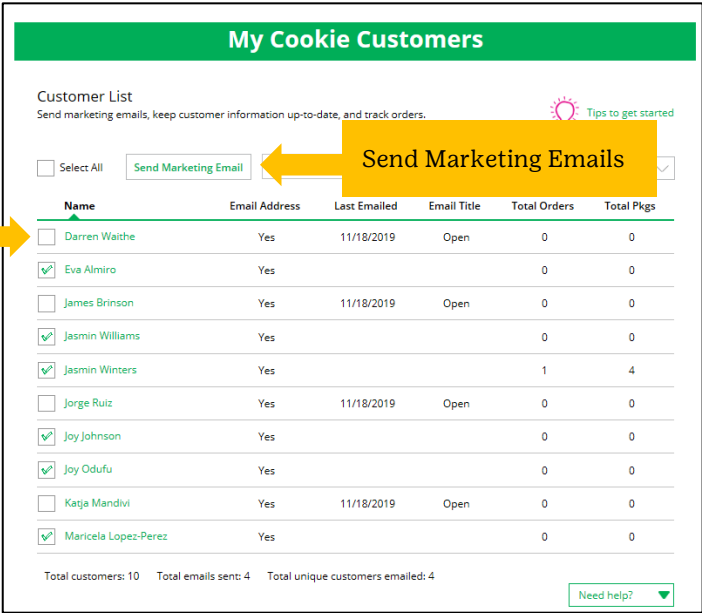


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Step 3a: Send Marketing Emails

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.”
Next, select which of the three emails you would like to send at this time:

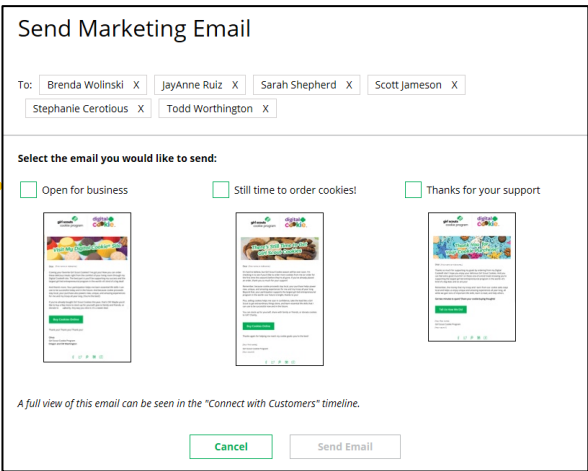
“Open for business” or “Shipping Promotion”, “There’s still time to order cookies,” or “Thanks for your support.”



The screenshot shows the 'My Cookie Customers' interface. At the top, there is a green header with the title 'My Cookie Customers'. Below it, a 'Customer List' section includes a sub-header 'Send marketing emails, keep customer information up-to-date, and track orders.' and a 'Tips to get started' link. A yellow callout box labeled 'Send Marketing Emails' points to a button with the same text and a dropdown arrow. To the left, another yellow callout box labeled 'Select the customers' points to a 'Select All' checkbox. Below the buttons is a table with columns: Name, Email Address, Last Emailed, Email Title, Total Orders, and Total Pkgs. The table lists ten customers, with checkboxes in the 'Name' column. Some checkboxes are checked (Eva Almiro, Jasmin Williams, Jasmin Winters, Joy Johnson, Joy Odufu, Maricela Lopez-Perez). At the bottom of the table, summary statistics are shown: 'Total customers: 10', 'Total emails sent: 4', and 'Total unique customers emailed: 4'. A 'Need help?' link is at the bottom right.

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

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



The screenshot shows the 'Send Marketing Email' dialog box. At the top, there is a 'To:' field with several customer names in a list: Brenda Wolinski, JayAnne Ruiz, Sarah Shepherd, Scott Jameson, Stephanie Cerotious, and Todd Worthington. Below this, a section titled 'Select the email you would like to send:' contains three options, each with a checkbox and a preview image: 'Open for business', 'Still time to order cookies!', and 'Thanks for your support'. A yellow callout box labeled 'Check the box for your selection.' points to the first checkbox. At the bottom of the dialog, there are 'Cancel' and 'Send Email' buttons. A note at the bottom states: 'A full view of this email can be seen in the "Connect with Customers" timeline.'

When you have made your selection, check the box and then click “Send Email” at the bottom.

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Step 3b: Add Customer

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

Encourage Girl Scouts to add a “nickname” for their contacts like “Grandma” or “Uncle”

The only required field is name.. If you enter data in the “Nickname” field, the customer will receive their email addressed to the nickname instead of their first name.

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

If a Girl Scout attempts to add a customer that already has an email address in the customer list, the system will display a message that the record is a potential duplicate and ask what information should be maintained between the two records.

	YOU ENTERED	ON FILE
Name	<input checked="" type="radio"/> Jane Dow	<input type="radio"/> Suzie Greenburg
Address	<input checked="" type="radio"/> 43215	<input type="radio"/> ---
Phone	<input checked="" type="radio"/> 325-235-0273	<input type="radio"/> ---
Notes	<input checked="" type="radio"/> ---	<input type="radio"/> ---

You can also add customers who have made a purchase and aren’t in your customer list. See the “Parent Orders” tip sheet for details.

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Step 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.

Cancel
Yes

Step 3d: Import

Clicking on the “More” dropdown 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	K
First Name	Last Name	Nickname	Street Address	City	State	Zipcode	Phone Number	Email Address	Notes	
Jane	Dow	Aunt Jane	123 Main St	Rolling Hills	OK	23902		dctest664-14@girlscouts.org		

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

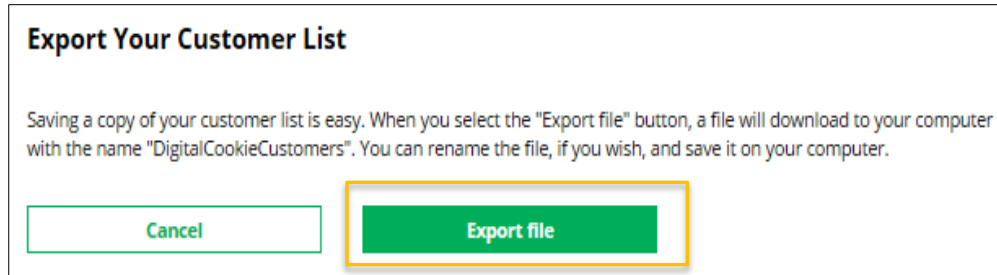
When the list is prepared and saved, use the “Choose File” button to select your file from where you saved it. Then click the green “Import File” button at the bottom. When it has successfully imported you can send marketing emails to those customers.

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Step 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.



Step 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 preview the different emails that are available to send to your customers - and get suggestions for when to use them.

Step 5: Site Link or QR Code

You can also send customers a link to your Digital Cookie website OR generate a QR code for them to use directly from your home page.

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