AtHomesoft Strive Help

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1 General Concepts

1.1 Finding and sorting information

To quickly find a particular contact, invoice, product, etc., you may need to filter or sort the records in a grid. There are several different methods that you can use.

What would you like to do?

Filter records using the categories in the left-hand pane

Filter records by entering a word or phrase

Sort records in a grid

Group records in the grid by a column

Filter records using the categories in the left-hand pane

Each module has a left-hand pane, which has several categories or groupings. You can click on one of these categories to quickly filter the records in the right-hand pane. Below is a description of the categories in each module.

Contacts

● **All Contacts:** Contains all active contacts.

● **New Contacts:** Contains all recently added contacts using the **New Customer Threshold** set in **Application Settings (Section 1.4)**.

● **Customers:** Contains all of the contact to whom you have made a sale.

● **By Last Sale Date:** Groups all contacts by the amount time since their last invoice. Draft invoices are not included.

● **Preferred Customers:** Contains all of your preferred Mary Kay® customers.* Contacts can be marked as preferred customers with the **Preferred Customer checkbox (Section 2.4)** on the **Additional Info** tab.

● **Potential Customers:** Contains all of the contacts to which you have not yet made a sale.

● **Consultants:** Contains all of your consultant contacts.

● **Inactive Contacts:** Contains all inactive contacts.

● **Category Groups:** You can create additional categories by adding new contact categories.

Schedule

The schedule module contains mini-calendars in the left-hand pane. Any date with an appointment is in bold text. You can click on any date in the calendar to jump to that date. You can also use the arrows next to the top month to move forward or backwards.

Sales

● **Unpaid Invoices:** Contains all invoices that are checked out and are not paid in full.

● **Draft Invoices:** Contains all invoices that have not yet been checked out.

● **By Calendar Year:** Contains all invoices except draft invoices, grouped by year.

● **By Contact:** Contains all invoices except draft invoices, grouped by contact.

● **Payments:** This group contains payments towards invoices rather than the actual invoices.

Inventory

● **Draft Orders:** Contains all orders that have not been submitted either manually or online.

● **Open Orders:** Contains all orders that have been submitted, but not yet fully received.

● **Completed Orders:** Contains all orders that have been fully received.

● **Sold/Used Since Last Order:** Includes all products that you have sold or used (e.g., personal use items) since you last placed an order.

● **Products To Order:** Includes any products that need to be ordered. Products are placed in this

category if they are included in an invoice and you do not have them in stock or if the number you have in stock falls below the **Reorder Level** in the Product Catalog.

- **Products On Order:** Includes any products that have been ordered, but not received.
- **Products In Stock:** Includes all products that you currently have in stock.
- **Inventory Adjustments:** Includes changes to in-stock products due to an inventory adjustment (e.g., consultant exchange or indicating products as damaged).

Product Catalog

- **All:** Contains all products in the Product Catalog.
- **Product Lines:** Each product line has it's own category, which includes only the products in that line. Timewise® and Velocity® are examples of Mary Kay® product lines.
- **Product Types:** Each product is categorized by the type of product, for example, Oil Control or Lip Liner.
- **Uncategorized:** Contains any products that are not categorized.
- **Discontinued:** Contains any product that has been discontinued.

> Products may be located in several categories. For example, many products belong to a product line and product type category.

Finances

- **Expenses:** Contains all expenses except mileage.
- **Income:** Contains all non-sales income.
- **Mileage:** Contains a log of your mileage expenses.
- **Finance Categories:** Contains a list of all of the income and expense categories you have created for tracking your non-sales income and expenses (except mileage, which is tracked separately).

Filter records by entering a word or phrase

You can filter records in the Contacts, Sales, Inventory, Product Catalog and Finances modules by typing a word or phrase that is contained within any of the columns in that grid. For example, you could search for an invoice in the Sales module by entering the contact's first name.

To filter records:

1. Select the module where you would like to find a record.
2. Click on the appropriate category for that record in the left-hand pane. Many modules include an "All" category if you are unsure.
3. Click in the **Filter (Section 1.2)** field in the upper right-hand corner of the right-hand pane.
4. Enter the text for which you would like to search. The text can be located in any displayed column in the grid. For example, you could enter a product name or number in the Inventory module to search for a product.
5. Hit the **Enter** on your keyboard. The grid will automatically be filtered by any record that contains that text.
6. If you didn't find the record you were looking for, you can either enter another phrase and hit **Enter** to search all records again. Or, you can click the **x** to the right of the **Filter** field to clear the filter and view all of the records in that category.

Sort records in a grid

Any grid can be easily sorted by clicking on the column heading by which you would like to sort. Clicking once will sort the list ascending and clicking it a second time will sort it descending by that column.

Group records in the grid by a column

You may want to group the records in a grid by a particular column or group by multiple columns. For example, you can group the invoices in the Sales module by its payment state and then customer.

> Many categories actually include all records with a default grouping. For example, the **By**

> **Contacts** category in the Sales module includes all invoices grouped by contact.

To group records in any grid, simply drag-and-drop the column heading from the grid to the gray bar directly above the grid. You will see two large red arrows when you are in the right location. Repeat this process until you have grouped by all desired columns.

To remove a group, drag the group out of the grouping area (out of the gray area).

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1.2   Getting started guide

Welcome to AtHomesoft Strive!

AtHomesoft Strive helps you manage customer information, appointments, sales, inventory levels, orders and expenses. This Getting Started Guide will familiarize you with the application and guide you through the initial setup steps.

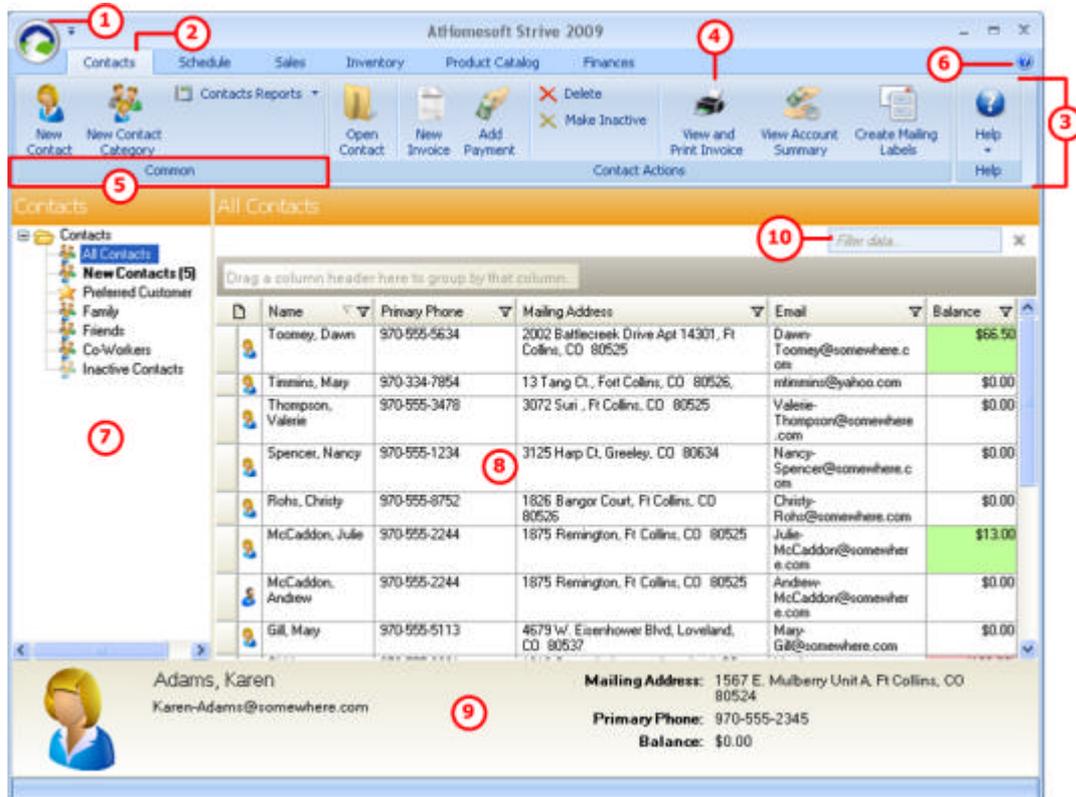
What would you like to do?

Learn about the AtHomesoft Strive dialogs

Start using AtHomesoft Strive

Learn about the AtHomesoft Strive Dialogs

Dialogs throughout AtHomesoft Strive have a common structure. Once you learn the elements of one dialog, using other dialogs in the program is easy. Below is a screenshot of a dialog with each element marked with a number.

1. **Application Button:** A menu is displayed when you click the application button. You can print reports, **back up your data (Section 1.3)** and specify your **Application Settings (Section 1.4)** from this menu.

2. **Tabs:** Most dialogs have information grouped on tabs. Each module has its own tab in the main dialog.

3. **Ribbon:** The toolbar at the top of the dialog is called a ribbon. The ribbon contains all of the available actions that you can take from that dialog. Some command buttons may appear or be hidden depending on the context. For example, the View and Print Invoice command button is only visible when a contact is selected in the right-hand pane.

4. **Command Button:** Command buttons enable you to complete tasks such as creating new contacts, printing reports, and viewing an invoice.

5. **Group:** Related command buttons in the ribbon are grouped by a group.

6. **Help:** Help can be accessed from any dialog by clicking on the help icon in the upper right-hand corner of the dialog.

7. **Left-hand Pane:** Each module has a left-hand pane, where the individual records in that area are grouped in order to easily find the information you need. For example, the Sales module has groupings for Draft Invoices, Unpaid Invoices and grouped By Contact.

8. **Right-hand Pane:** The individual records in each module are listed in the right-hand pane. You can select a record and use the command buttons or a right-click menu to perform tasks on that record (e.g., print a report or create a new invoice for a contact). You can open it to view more detail for that record or to modify it. As with any grid, you can sort the records ascending by a column by clicking in a column heading. To sort descending, click in the same column heading a second time.

9. **Footer:** The footer contains summary information, which can be used to quickly view key information without opening the record.

10. **Filter:** You can type a phrase contained in any of the columns to quickly filter the records in the right-hand pane. This field is used to easily find a record. To remove a filter, click the x next to the field.

Start using AtHomesoft Strive

To get started started with AtHomesoft Strive, you will need to:

- Enter your **contacts (Section 2.1)**.

- Enter your **initial inventory (Section 6.2)**.
- Schedule your upcoming **appointments (Section 3.1)**.
- Create your **expense and income categories (Section 7.1)**.
- Enter any **historical invoices ('Enter historical invoices' in the on-line documentation)**.

> AtHomesoft offers a complimentary migrations from many other programs. For more information, email **support@athomesoft.com**.

1.3   Backing up and restoring data

You should regularly backup your data in order to protect yourself from loss of data. Data can be lost in the event of a computer crash, sudden loss of power, or even by accidental deletion.

You will receive an automatic reminder to backup your data monthly.

What would you like to do?

Backup your entire AtHomesoft Strive database

Restore your data from a backup

Backup your entire AtHomesoft Strive database

1. Click the **Application Button (Section 1.2)** in the left-hand corner of the title bar of the main application.
2. Select **Manage** and then **Backup Data...**
3. Browse to the location where you would like to backup the data.

> You may want to save the backup on an external hard drive, CD or USB drive. Saving the data in a completely separate location ensures that your data can be retrieved in the event that your computer is severely damaged.

4. Change the filename if desired. By default, the file is called "AtHomesoft-" plus today's date.
5. Click **Save**.
6. Click **OK** to the message that confirms the successful completion of the backup.

Restore your data from a backup

When you restore a previously saved backup, you completely replace all data in AtHomesoft Strive. It is recommended that you first create a backup in case you need to restore the current data.

To retrieve the data that you previously saved in a backup:

1. As a precaution, you may want to create a backup of the current data.
2. Click the **Application Button (Section 1.2)** in the left-hand corner of the title bar of the main application.
3. Select **Manage** and then **Restore Data from Backup...**
4. Navigate to the location where you saved the backup file.
5. Select the backup file, which will have the extension **.bak.zip**.
6. Click **Open**.
7. Click **Yes** to confirm that you would like to restore the previous backup.
8. Answer **OK** to the message that informs you of a successful restore. The application will automatically close.
9. Re-open AtHomesoft Strive and verify that the data includes the data you expected. If not, you can restore the backup created in Step 1.

1.4   Application Settings overview

Application Settings contain all of your information and your preferences. These settings are used in many reports including invoices and the Weekly Accomplishment Sheet.

When you first installed AtHomesoft Strive, the initial dialogs actually took you through most of the Application Settings fields. However, you may need to change them from time to time.

Application Settings contain many different sections, which can be viewed using the menu on the left-hand side of the dialog.

What would you like to do?

Open Application Settings

Enter your user information

Customize the display

Customize sales, inventory, and order calculations

Enter preferences for the Weekly Accomplishments report

Customize your invoice format

Setup your account information for processing credit cards through ProPay®

Open Application Settings

To access Application Settings:

1. Click the **Application Button (Section 1.2)** in the left corner of the title bar in the main application.

2. Click **Application Settings** at the bottom of the menu.

Enter your user information

The **Profile** section of Application Settings includes all of your information. Your name and contact information are used in many reports, including the invoice. Complete this section with the information that you would like to appear on those reports.

Customize the display

The **General** section contains the following options for changing the display within AtHomesoft Strive:

- **Color scheme:** Customize the color used to display the dialogs.

- **Display contacts with last name first:** When checked, contacts are displayed in the format: Last Name, First Name. If unchecked, the contact's name is displayed in the format: First Name Last Name. This setting will affect how contact names are displayed in the application as well as reports.

> You will not see the change until you add a record to the grid or log out and back in.

- **Show product image:** If you have a slow internet connection or you notice low performance particularly in the Product Catalog, you may wish to turn off the images in the Product Catalog to increase the performance of Strive.

- **Product Catalog:** Select which product catalog you would like to download in new updates.

> When you initially install Strive, you select your product catalog to initially populate the database. Changing the product catalog in Application Settings only affects new updates for your catalog, so this change will be seen the next time your product catalog is updated.
>
> Products are never deleted when you switch your product catalog, which means that products offered in one catalog but not the other will remain in your product catalog after switching.

- **New Customer Threshold:** Indicate the number of days a new contact should remain in the **New Contacts** category in the **Contact** module.

Customize sales, inventory, and order calculations

The **Sales/Orders** section contains some options that affect how your sales total is calculated. The

following fields are used to default values in the invoice, but can be changed at the time you create it:

- **Sales Tax:** Enter the sales percentage for your region, which will default in the Sales Tax field for all invoices and product orders. You can change the sales tax at the time you create the product order or invoice.
- **Calculate Invoice Sales Tax after Discount:** Select **No** to calculate the sales tax on the full retail value of the products in the invoice. Select **Yes** to calculate the sales tax on the discounted total only.
- **Include shipping and handling charges when calculating sales tax:** In some states, sales tax should be charged for shipping and handling fees. If you live in such a state, check this box.

The **Automatic 2+2+2 Reminder Creation** field gives you the option to have your 2+2+2 reminders automatically added to the calendar. You can choose to automatically create these reminders for new customers only (customer with no previous sales), all invoices, or never. You can always change this option on individual invoices.

> Automatic 2+2+2 reminders add three reminders to your calendar to follow up with a customer after a sale. The reminders are added 2 days, 2 weeks, and 2 months after the sale.

You can indicate the discount percentage that your supplier gives you on wholesale purchases in the **Supplier Discount** field. This value is used to calculate the wholesale price you pay for product orders.

Enter preferences for the Weekly Accomplishments report

The **Weekly Accomplishments** section contains information that is used to populate the **Weekly Accomplishments report (Section 8.2)**:

- **Start of Week:** Select the day of the week that should be included as the first day in the report.
- **Year to Date Start Month:** Select the starting month for year-to-date calculations. For example, if you would like to calculate your year-to-date total starting on the first of the year, select January.
- **Estimated Profit:** Enter the percentage that should be used to calculate your estimated profit.
- **Deduct Discount for Sales Totals:** Check this box if the totals on the Weekly Accomplishments report should be the actual amount paid by the customer after the discount. Uncheck this box if the totals should be based on the retail value of the product.

Customize your invoice format

You can change the colors, style, description, and picture used in your invoices and use the **Preview** button to view the formats chosen. Use the following fields to customize your invoice format:

- **Text Color:** Select the color of all text except headings.
- **Heading Text:** Select the color used for headings in the invoice.
- **Accent Color:** Select another color, which will be used as an accent in the invoice.
- **Style:** You have two different invoice templates from which to choose: Elegant or Simple.
- **Default Comment:** Enter a comment in the large text box in the bottom of the dialog. This comment will default in all new invoices, but you can change the comment when you create an invoice.
- **Logo:** Click on the picture on the right to select a picture to use as a logo on the invoice.

You can click the **Reset** button to change all of these options back to the defaults if desired.

Setup your account information for processing credit cards through ProPay®

If you have a ProPay® account, you can add your account details in Application Settings in order to:

- Process your customer's credit cards through AtHomesoft Strive.
- Add a Pay Now link to an email to a customer, which she can use to pay you online.
- Automatically expense ProPay® payments.

To enter your account details:

1. In the **ProPay** section, enter your **ProPay Account Email**.
2. Enter the **Last 4 Digits of your Social Security Number**.
3. Click **Retrieve Account Number**. Your account number will automatically populate in the **ProPay**

Account Number field.

4. Click **Apply** to save your changes.

When payments are processed in Strive, you can set up Strive to automatically add an expense for the payments:

1. Click **Create finance expense items automatically**.

2. Enter the amount you are charged for each payment in the **Basic Fee**.

3. Enter the payment percentage you are charged for each type of credit card.

4. Click **Apply** to save your changes.

1.5   Export or print any grid

You can easily export or print a report for any grid in Strive. For example, you could print all of the products a contact has purchased from the History tab of the contact.

To export a grid to Microsoft Excel®:

1. Open the dialog where the grid exists.

2. Click **Export to Excel** in the **Common** group.

3. Browse to the location you would like to save the file and give it a name.

4. Click **Save**.

5. You will be prompted to open the file. Answer **Yes** to open it right away or **No** to view it later.

To print a report of a grid:

1. Open the dialog where the grid exists.

2. Click **Print Preview** in the **Common** group.

1.6   Send error report to AtHomesoft, LLC

If you receive an error, you have an option to report the issue by sending an error report to AtHomesoft, LLC. These error reports are used to correct issues and improve the product.

When you receive the error, simply click the **Send Error Report to AtHomesoft** button. A new email with your log file attached and details on the specific error will open. Provide details in the email on what you were doing at the time of the error and click **Send**. Someone in support may contact you for more details or to inform you of the solution.

1.7   Edit multiple records in a grid for quick data entry

You can toggle some grids into "edit mode" in order to modify many records in that grid at one time instead of opening each individual record to make changes. For example, you may want to change your in-stock quantity for many products at the beginning of the year when you do a physical inventory count.

The Contacts, Product Catalog and several views in the Inventory module have such an edit mode. Editable grids have the following toolbar directly above them:

To edit multiple records in a grid:

1. Click the Edit button in the menu directly above the grid. The Edit button will appear depressed. Fields in gray italics are not editable.

2. Click in the fields and make changes as desired. The left and right arrows in the menu can be used to undo and redo changes made in the grid.

3. Click the diskette button to the left of the Edit button to save when you are finished.

4. If you made changes to product in-stock quantities, you will be prompted to enter inventory adjustment details. Enter the details for the inventory adjustment and click OK to save.

1.8   Change the visible columns in a grid

You can select the columns displayed in any grid in order to view the information that is important to you. Once columns are added to a grid, you can **group (Section 1.1)** or **sort (Section 1.1)** by them to find information that you need quickly.

Your column preferences are saved, so the next time you view that same grid, the same information is displayed.

To change the visible columns in a grid:

1. Click the **Grid Settings** menu in the upper right-hand corner of the grid:
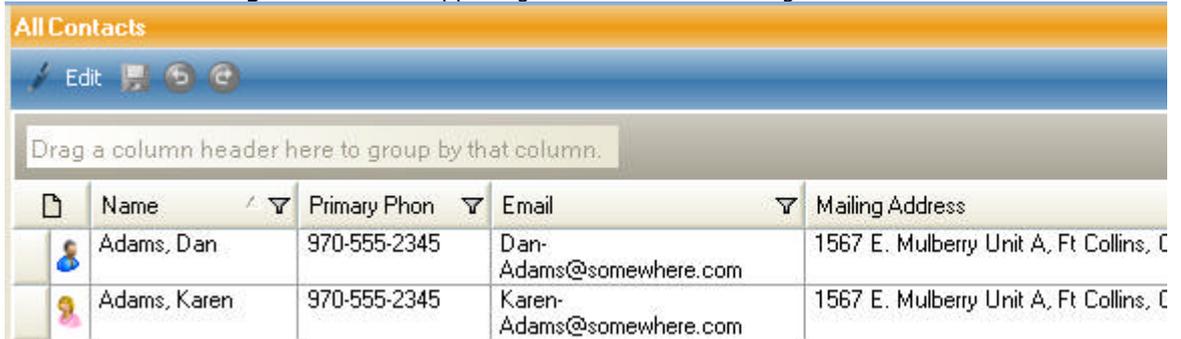
2. Select **Choose Columns** from the menu.

3. Check or uncheck the columns that you would like to display in the grid in the **Field Chooser** dialog:
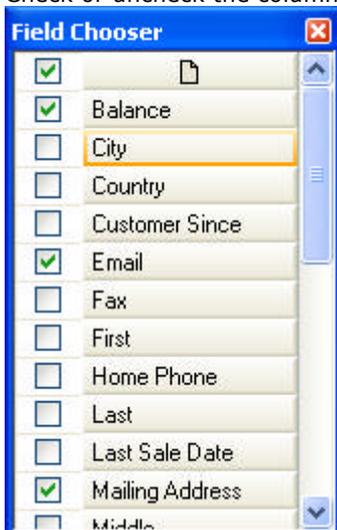
4. Close the Field Chooser dialog when you are finished selecting columns by using the X in the upper right-hand corner.

2   Contacts

2.1   Contacts overview

Store contact address, phone number, email, and preference information in the Contacts module. Contacts are used to schedule meetings, create invoices and analyze sales trends.

Consultants, customers, and prospects are all included as contacts.

What would you like to do?

Create a contact

Edit a contact

Find a contact

Create a consultant

Send an email to a contact

Make a contact inactive

Make an inactive contact active

Delete a contact

Create a contact

1.   In the Contacts module, click **New** in the **Common** group.

2.   Use the fields and tabs to enter contact information.

3.   Click **Save and Close** in the **Common** group.

Edit a contact

1.   In the left-hand pane of the Contacts module, click the category in which the contact exists. The list of contacts will appear in the right-hand pane.

2.   Highlight the contact that you would like to edit.

3.   Click **Open Contact** in the **Common** group.

4.   After making changes, click **Save and Close** in the **Common** group.

> If you need to modify several contacts at one time, you can toggle the grid into **edit mode (Section 1.7)**.

Find a contact

There are two methods to quickly find a contact:

1.   Click on the **All Contacts** group in the left-hand pane. Enter a part of the contact's name, phone, address or email in the **Filter data** field in the upper-right hand corner of the right-hand pane and click Enter. The right-hand pane will be filtered by any record that contains that word or phrase. To clear the filter, click the **x** to the right of the field.

2.   Select a category in the left-hand pane to filter records in the right-hand pane. The categories include:

   o   **All Contacts:** Contains all active contacts.

   o   **New Contacts:** Contains all recently added contacts using the **New Customer Threshold** set in **Application Settings (Section 1.4).**

   o   **Customers:** Contains all of the contact to whom you have made a sale.

   o   **By Last Sale Date:** Groups all contacts by the amount time since their last invoice. Draft invoices are not included.

   o   **Preferred Customers:** Contains all of your preferred Mary Kay® customers.* Contacts can be

marked as preferred customers with the **Preferred Customer checkbox (Section 2.4)** on the **Additional Info** tab.

○ **Potential Customers:** Contains all of the contacts to which you have not yet made a sale.

○ **Consultants:** Contains all of your consultant contacts.

○ **New Consultants:** Contains all consultants with a **Status** of N0, N1, N2, or N3.

○ **My Unit:** Contains all consultants that have the same **Unit Number** as your unit. Your unit is indicated in the **Profile** section in **Application Settings (Section 1.4)**.

○ **Inactive Contacts:** Contains all inactive contacts.

○ **Category Groups:** You can create additional categories by adding new contact categories.

> You can click on any column heading in the grid to sort the list ascending by that column. To sort descending, click the same heading a second time.

Create a consultant

A consultant is a type of contact. To create a new consultant, first create a contact and then select **Make Consultant** in the **Common** group. The tab, **Consultant Details** tab will become active where you can enter consultant information.

Send an email to a contact

You can select a contact or a group of contacts to send an email. AtHomesoft Strive will create a new email using your default email program and default the contact email in the **To** field.

To send an email to a contact:

1. In the left-hand pane of the Contacts module, click the category in which the contact exists. The list of contacts will appear in the right-hand pane.

2. Highlight the contact that you would like to send an email.

> You can select multiple adjacent contacts by first selecting the first contact and holding down the Shift key while selecting the last contact that should be included. To select multiple non-adjacent contacts, hold down the Ctrl key while selecting the individual contacts.

3. Click **Send Email** in the **Contact Actions** group in the menu.

4. Type a **Subject** and the **Message** as normal.

5. Send the message.

Make a contact inactive

You may want to remove contacts that no longer purchase products from your active contacts in order to prevent accidentally including them in invoices and to remove clutter. No new invoices can be made for an inactive contact; however, you can still add payments to any outstanding invoices for an inactive contact.

To make a contact inactive:

1. In the left-hand pane of the Contacts module, click the category in which the contact exists. The list of contacts will appear in the right-hand pane.

2. Highlight the contact that should be made inactive.

3. Click **Make Inactive** in the **Contact Actions** group. The contact will be moved to the **Inactive Contacts** category in the left-hand pane.

> A contact cannot be deleted once a transaction has been created for that contact in order to maintain financial history. You must make contacts inactive to remove them from your active contacts.

Make an inactive contact active

You may want to re-activate a contact in order to create an invoice. To make a contact active:

1. In the left-hand pane of the Contacts module, click the **Inactive Contacts** category. The list of

contacts will appear in the right-hand pane.

2. Highlight the contact that should be made active.

3. Click **Make Active** in the **Contact Actions** group. The contact will be moved to the **Active Contacts** category in the left-hand pane. You can now create an invoice for the contact.

Delete a contact

Only contacts that have no transactions (invoices or payments) can be deleted. To delete a contact:

1. In the left-hand pane of the Contacts module, click the category for the contact. The list of contacts will appear in the right-hand pane.

2. Highlight the contact that should be deleted.

3. Click **Delete** in the **Contact Actions** group.

* AtHomesoft Strive is not affiliated with Mary Kay®.

2.2   Create and use contact categories

Use contact categories to group contacts by common traits in order to easily manage and find them. For example, you may have categories for relatives, co-workers, prospects, mailing lists or promotions. Categories appear in the left-hand pane of the Contacts module. Contacts can be associated with multiple categories.

What do you want to do?

Create a new category

Add a category to a contact

Remove a contact from a category

Delete a contact category

Create a new contact category

1. In the Contacts module, click **New Contact Category** in the **Common** group.

2. Type the contact category name.

3. Click **OK**. Any contact can be associated with this category through the **Categories** field on the Contact form.

Add a category to a contact

1. In the left-hand pane of the Contacts module, click a category in which the contact exists. The list of contacts will appear in the right-hand pane.

2. Highlight the contact that you would like to categorize.

> You can select multiple adjacent contacts by first selecting the first contact and holding down the Shift key while selecting the last contact that should be included. To select multiple non-adjacent contacts, hold down the Ctrl key while selecting the individual contacts.

3. Click **Add to Category** in the **Contact Actions** group and select the appropriate category from the list. If you would like to create a new category, select **[Add to New Category]**, type in the category name and click **OK**.

Remove a contact from a category

1. In the left-hand pane of the Contacts module, click a category in which the contact exists. The list of contacts will appear in the right-hand pane.

2. Highlight the contact that you would like to remove from a category.

> You can select multiple adjacent contacts by first selecting the first contact and holding down

the Shift key while selecting the last contact that should be included. To select multiple non-adjacent contacts, hold down the Ctrl key while selecting the individual contacts.

3. Click **Remove from Category** in the **Contact Actions** group and select the appropriate category from the list.

Delete a contact category

If you delete a contact category, the category is automatically removed from any contacts in that category. To delete a category:

1. In the left-hand pane of the Contacts module, click the category.
2. Select **Delete** in the **Contact Category Actions** group.
3. Click **Yes** to confirm the deletion.

Rename a contact category

1. In the left-hand pane of the Contacts module, click the category.
2. Select **Rename** in the **Contact Category Actions** group.
3. Enter the new category name and click **OK**.

4.3   Create a new invoice from a contact

You can quickly create an invoice from scratch or re-order previously purchased products from the contact.

What would you like to do?

Create a new invoice from scratch from the contact

Re-order previously purchased products for a contact

Create a new invoice from scratch from the contact

1. In the left-hand pane of the Contacts module, click a category of the contact. The list of contacts will appear in the right-hand pane.
2. In the right-hand pane, select the contact for which you would like to create an invoice.
3. Select **New Invoice** from the **Contact Actions** group in the ribbon or from the right-click menu. The contact is automatically selected for the new invoice.
4. Complete the Invoice Detail form and print the invoice as normal.

You can also create a new invoice from the contact form when you have a contact already open by clicking on the application button and selecting **Invoice** from the **Create New Item** menu.

Re-order previously purchased products for a contact

You can start an invoice by selecting previously purchased products and then add additional products if desired.

1. In the left-hand pane of the Contacts module, click a category of the contact. The list of contacts will appear in the right-hand pane.
2. In the right-hand pane, select the contact for which you would like to create an invoice.
3. Click **Open Contact** in the **Contact Actions** group in the ribbon or from the right-click menu.
4. Select the **History** tab.
5. Click on the **Products** sub-tab.
6. Select the products that you would like to add to a new invoice for this contact.

You can select multiple adjacent products by selecting the first contact and holding down the

Shift key while selecting the last product that should be included. To select multiple non-adjacent products, hold down the Ctrl key while selecting the individual products.

7. Right-click on one of the selected products and select **New Invoice** from the menu. The new invoice will be automatically populated with the contact and the selected products.

8. Add additional products and complete the invoice as normal.

2.4   Add a contact to your preferred customers

Contacts who are in the Mary Kay® Preferred Customers Program (PCP) appear in the Preferred Customers folder in the left-hand pane in the Contacts module.* Use this list to send your Preferred Customers catalog.

To add a contact to your preferred customers:

1. In the left-hand pane of the Contacts module, click the category in which the contact exists. The list of contacts will appear in the right-hand pane.

2. Highlight the contact that you would like to add to your preferred customers.

3. Click **Open Contact** in the **Common** group.

4. Click on the **Additional Info** tab.

5. Check the **Preferred Customer** checkbox.

6. Enter or select a date in **Enroll Date**.

7. Click **Save and Close** in the **Common** group.

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4.5   Automatically discount all new sales for a contact

You may offer your most loyal customers a standard discount. You can indicate this discount on the contact, so it is automatically added to all new invoices. You can change this discount amount at the time you create the invoice.

To indicate a discount for a contact:

1. In the left-hand pane of the Contacts module, click the category in which the contact exists. The list of contacts will appear in the right-hand pane.

2. Highlight the contact that you would like to add to your preferred customers.

3. Click **Open Contact** in the **Common** group.

4. Click on the **Additional Info** tab.

5. Enter a discount percentage in the **Discount** field. For example, to give a contact a 10% discount on all new invoices, enter 10.00.

6. Click **Save and Close** in the **Common** group.

2.6   Enter customer profile information

You may wish to save the information you collect from the Mary Kay® Customer Profile Card.* To enter this profile information:

1. In the left-hand pane of the Contacts module, click the category in which the contact exists. The list of contacts will appear in the right-hand pane.

2. Highlight the contact in the right-hand pane.

3. Click **Open Contact** in the **Common** group.

4. Click on the **Profile** tab and complete the fields.

5. Click **Save and Close** in the **Common** group.

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2.7   Indicate a relationship between contacts

You may want to note a relationship between contacts in order to refresh your memory when talking to a contact. Relationships are saved on the **Relationships** tab of the contact.

To indicate a relationship between contacts:

1. In the left-hand pane of the Contacts module, click the category in which the contact exists. The list of contacts will appear in the right-hand pane.

2. Highlight the contact in the right-hand pane.

3. Click **Open Contact** in the **Common** group.

4. Click on the **Relationships** tab.

5. Click on the **Add Relationship** button in the **Relationships** group.

6. Select the related contact from the Add Relationship dialog.

7. Use the drop-down below the contact list to indicate a type of relationship.

8. Click **OK** to add the relationship to the contact.

9. Click **Save and Close** in the **Common** group.

2.8   Remove a relationship between contacts

1. In the left-hand pane of the Contacts module, click the category in which the contact exists. The list of contacts will appear in the right-hand pane.

2. Highlight the contact in the right-hand pane.

3. Click **Open Contact** in the **Common** group.

4. Click on the **Relationships** tab.

5. Select the contact for which the relationship should be removed.

6. Click on **Remove Relationship** in the **Relationships** group.

7. Click **Save and Close** in the **Common** group.

2.9   View contact history

You can quickly view a contact's purchase, meeting and payment history in order to use as a reference when talking to a contact or to assist you in creating new invoices. You can also create a **new invoice based on a contact's previous purchases (Section 4.3)**.

To view the contact's history:

1. In the left-hand pane of the Contacts module, click the category in which the contact exists. The list of contacts will appear in the right-hand pane.

2. Highlight the contact in the right-hand pane.

3. Click **Open Contact** in the **Common** group.

4. Click on the **History** tab. You will see the contact's payment history.

5. Use the **Products, Sales, Payments, Appointments,** and **Exchanges** tabs on the left to view the contact's history.

> You can also print the **Account Summary Report (Section 8.1)** to view a contact's transaction history.

2.10   View a map of a contact's address

If you have an appointment at a contact's address, you can view a map of the location. An internet connection is needed to view a map.

To view a map of the contact's address:

1. In the left-hand pane of the Contacts module, click a category of the contact. The list of contacts will appear in the right-hand pane.

2. In the right-hand pane, select the contact for which you would like view a map.

3. Click **Open Contact** in the **Contacts Actions** group.

4. Click on the **Maps & More** tab. You can do the following on this tab:

    1. Enter a start address and click **Get Directions** to get directions to this location.

    2. Change the view by selecting an option in the menu in the upper left-hand corner of the map (e.g., click on Road).

    3. Zoom in or out using the menu on the left.

    4. Move the focus of the map using the arrows in the upper left-hand corner.

8.3   Create contact mailing labels

You can quickly create mailing labels with 6, 10, 20, 30, or 80 labels per sheet and print them using Avery® sheets.

To create mailing labels:

1. In the left-hand pane of the Contacts module, click the category in which the contacts exist. The list of contacts will appear in the right-hand pane.

    > If the desired contacts are not in the same category, select the **All Contacts** item in the left-hand pane.

2. In the right-hand pane, select the contacts for which you would like to create mailing labels.

    > You can select multiple adjacent contacts by selecting a contact and holding down the Shift key while selecting the last contact that should be included. To select multiple non-adjacent contacts, hold down the Ctrl key while selecting the individual contacts.

3. Click **Create Mailing Labels** in the **Contact Actions** group.

4. Select the appropriate format from the **Format** group.

5. Since the last page of the mailing labels may not use all of the mailing labels in a sheet, you may wish to print duplicate labels to complete the page. In this case, select **Repeat to End** and then **Refresh** in the **Options** group.

6. You may not want to start printing on the first label if you have partially used a sheet. To start on a different number, enter the number of the start label in the **Start At** field and then click **Refresh** in the **Options group.** Labels are counted across from left to right and then down.

7. Place the appropriate Avery mailing label sheets in the printer.

8. Click the Print button in the report toolbar.

9. Select the desired print options and click Print.

2.12   Import/export contacts to another program or synchronize with Microsoft Outlook

You may have another contact management program, such as Microsoft Outlook®, from which you would like to import contacts. Contacts can be imported from a CSV file (most programs have a CSV export) or directly from Mary Kay® InTouch®.

You can export AtHomesoft Strive contacts into many other programs, including many mobile phones. You can use either vCard Electronic Business Card Format or CSV Format to export the contacts.

You can also synchronize your contacts with Outlook. Once a contact is synchronized, any changes in either Outlook or Strive will be pushed to the other application upon subsequent synchronizations.

> AtHomesoft offers a complimentary migrations from many other programs. For more information, email **support@athomesoft.com**.

What would you like to do?

Learn about the import/export formats and synchronization

Import contacts from a CSV file

Import customers or consultants from Mary Kay® InTouch®

Export contacts to CSV file

Export contacts to vCard files

Learn about the import/export formats and synchronization

Microsoft Outlook Synchronization: You can synchronize all of your Outlook and Strive contacts. The synchronization will add your Outlook contacts into Strive and your Strive contacts into Outlook. Once you have synchronized your contacts, you can update any changes made in either program by synchronizing again.

CSV File: You can import or export your contacts using a CSV file, or Comma-Separated Values file. A CSV file is a tabular format, which uses commas to separate the fields for each record and separate lines are used for each record. It is used in many contact applications, including Microsoft Outlook® and Google Gmail®.

vCard: vCard is a file format for electronic business cards. A separate file is created for each contact that is exported. Contacts can be exported from AtHomesoft Stive into vCard format, but an import using this format is not currently supported. vCards are used by many email and contact applications, including Microsoft Outlook® and many mobile devices.

Synchronize contacts with Outlook

To add all your Outlook contacts into Strive and your Strive contacts into Outlook:

1. Click the **Application Button (Section 1.2)** in the left-hand corner of the title bar of the main application.

2. Select **Import/Export** and then **Synchronize with Outlook.**

3. If new contacts have been added, you will be prompted with a list of contacts to add to the other program. Check the contact checkboxes to synchronize them or uncheck the boxes to choose not to synchronize.

4. Anytime you would like to update Stive or Outlook with changes from the other program, synchronize using the same steps described above.

Import contacts from a CSV file

You can populate AtHomesoft Strive from a CSV file that was created from another contact management program by following the below steps:

1. Click the **Application Button (Section 1.2)** in the left-hand corner of the title bar of the main application.

2. Select **Import/Export** and then **Import Contacts from CSV File.**

3. Browse to the CSV file that you created from another program and click **Open**.

4. The **Contact Import** message will appear with the number of imported contacts. Click **OK.**

Import customers or consultants from Mary Kay® InTouch®

You can populate AtHomesoft Strive from your Mary Kay® InTouch® customers or consultants by following the below steps:

1. Click the **Application Button (Section 1.2)** in the left-hand corner of the title bar of the main application.

2. Select **Import/Export** and then **Import Contacts from InTouch®** to import your Preferred Customers or **Import Consultants from InTouch**® to import other consultants. The InTouch® web page will open in a separate window with a Strive menu and an instruction pane on the left.

3. Log into InTouch®.

4. Click the **Import Contacts** or **Import Consultants** button in the **Import** group in the menu. Another dialog will open with a spreadsheet of all your contacts.

5. Review the contacts in the spreadsheet and make any changes if necessary.

6. Click **Save**.

7. You will be prompted at the end of the import with a dialog informing you of the number of contacts imported. Click **OK**.

Export contacts to a CSV file

You can export your contacts into a CSV file, which can then be used to import your contacts into another program.

To export contacts to a CSV file:

1. Click the **Application Button (Section 1.2)** in the left-hand corner of the title bar of the main application.

2. Select **Import/Export** and then **Export Contacts to CSV File.**

3. Browse to the location where you would like to save the file.

4. Enter a name and click **Save**.

Export contacts to vCard files

You can export your contacts to vCard files, which can then be imported into another program.

To export contacts to vCard files:

1. Click the **Application Button (Section 1.2)** in the left-hand corner of the title bar of the main application.

2. Select **Import/Export** and then **Export Contacts to vCard Files.**

3. Browse to the location where you would like to save the files.

4. Enter a name and click **Save**.

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7.4   Adjust contact's balance or indicate bad debt

You can manually change a contact's balance if you do not expect payment for that balance. Generally, there are two situations where you might adjust a contact's balance:

- **Small adjustments:** You may need to make small adjustments to contact balances from time-to-time. For example, if you incorrectly calculated the total of an invoice while with the customer and found that you undercharged her $1.50 when you enter the payment in Strive. Instead of maintaining such a small balance or asking the customer for payment, you may decide to simply reduce the contact's balance. *Small adjustments are treated in the same manner as discounts for tax purposes.*

- **Bad debt:** When you are unable to collect payment for a debt, you can write it off as a bad debt expense if you have appropriate documentation for that debt. For example, you could enter a bad debt expense for a returned check or declined credit card. *Bad debt is included as an expense for tax purposes.*

To adjust a contact's balance or indicate bad debt:

1. Select the contact in the Contact's module or the invoice in the Sales module for which the adjustment will be made.

2. Click **Balance Adjustment** in the ribbon.

3. Indicate the **Date** and **Amount** of the adjustment.

4. Select the **Type**. If you would like to make a small adjustment, select **Balance Adjustment**. If you would like to indicate bad debt, select **Bad Debt from Sales or Services**.

> For tax purposes, you must have appropriate documentation in order to claim a bad debt expense.

5. Enter a **Reason** for the adjustment.

6. Click **OK** to save the adjustment.

3　Schedule

3.1　Schedule overview

Use the calendar to schedule appointments with your contacts. You can associate invoices and attendees to appointments in order to populate your Weekly Accomplishments.

What would you like to do?

Schedule a new appointment

Delete an appointment

Change the calendar view

Edit an appointment

Go to a particular date in the calendar

Schedule a new appointment

1. In the Schedule module, click **New** in the **Common** group.

2. Enter a **Subject**.

3. Select a **Type**. Birthdays and anniversaries will appear in the calendar every year.

4. Select the **Start Date/Time** and **End Date/Time.**

5. If you would like a reminder for the appointment, check the **Reminder** checkbox and select when you would like the reminder to appear. Reminders will only appear if the application is open at the reminder time or when it is next opened.

6. Fill out any other appropriate fields.

    1. You can **add contacts as attendees (Section 3.2)** or **add invoices (Section 3.3)** to the appointment. Any contacts and invoices on the appointment will be auto-populated into the **Weekly Accomplishment Sheet (Section 8.2)** report using the **Type** drop-down.

    2. By default, you are listed as the hostess. To change the hostess, click **Set Hostess** and then **Select Contact** from the Attendees group in the ribbon.

    3. If this appointment will occur on a regular basis, you can make it a recurring appointment by clicking **Recurrence ('Create a recurring appointment' in the on-line documentation)** in the ribbon.

7. When finished, click **Save and Close** in the **Common** group.

Delete an appointment

1. In the Schedule module, click the appointment you would like to delete.

2. Double-click the appointment you would like to delete to open it.

3. Click **Delete** in the **Common** group.

4. Answer **Yes** to the confirmation prompt.

Change the calendar view

You can zoom in or out in the calendar to see more detail or a larger date range. You can view one day in order to see the exact beginning and end times, view one week, or view an entire month at one time.

To change the view, in the Schedule module, click **Day**, **Week**, or **Month** in the **Calendar View** group to view the desired date range.
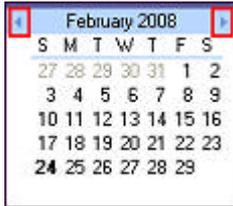
Edit an appointment

To open an existing appointment, double-click the appointment in the Schedule module.

Go to a particular date on the calendar

To go to today's date, click **Today** in the **Calendar View** group.

You can use the miniature calendars in the left-hand pane to go to a specific date. Simply click on the desired date. If the date is not shown, use the arrows on the top-most calendar month in the left-hand pane to navigate to the appropriate month.

3.2   Add or remove attendees to an appointment

You can associate your contacts with appointments in the scheduler, which will auto-populate the **Weekly Accomplishment Sheet (Section 8.2)**. Attendees and related contact information are listed on the **Attendees** tab of the appointment.

What would you like to do?

Add an attendee to an appointment

Remove an attendee from an appointment

Add an attendee to an appointment

1. Open an existing appointment by double-clicking it or create a new one.
2. Click **Add Attendee** in the **Attendees** group of an appointment. The **Add Appointment Attendees** dialog opens with a list of all contacts.
3. You can filter the list by categories by using the **Filter list by contact category** field or by using the top-most row to **find the contact (Section 1.1)**.
4. Highlight the contact and click **Add** if you will be adding additional attendees or **Add & Close** if you are finished.

    > You can select multiple adjacent contacts by first selecting a contact and holding down the Shift key while selecting the last contact that should be included. To select multiple non-adjacent contacts, hold down the Ctrl key while selecting the individual contacts.

5. Click **OK**. The contacts appear on the **Attendees** tab.
6. Click **Save and Close**.

    > To select a hostess, click **Set Hostess** and then **Select Contact** from the Attendees group in the ribbon.

Remove an attendee from an appointment

1. Open the appointment from which the attendee should be removed.
2. Click the **Attendees** tab.
3. Select the contact that should be removed.
4. Click **Remove Attendee** in the **Attendees** group of an appointment.
5. Click **Save and Close**.

3.3   Add or remove invoices from an appointment

You can associate invoices with your appointments in order to track the sales from them and to auto-populate the **Weekly Accomplishment Sheet (Section 8.2)** report. You can associate existing

invoices or create a new invoice and associate it to the appointment. You can only associate invoices for contacts listed on the **Attendees** tab.

What would you like to do?

Create a new invoice and immediately associate it to the appointment

Associate an existing invoice to an appointment

Create a new invoice and immediately associate it to the appointment

1. **Create a new appointment (Section 3.1)** or open an existing appointment in the **Schedule** module.
2. **Add the attendee (Section 3.2)** to the appointment if not already associated with the appointment.
3. Click **Add New Invoice** in the **Sales** group.
4. Select the attendee for the invoice and click **Create**.
5. **Create the invoice (Section 4.1)** as normal. Once you have saved and closed the invoice, you will see the it on the **Sales** tab of the appointment.
6. Click **Save and Close**.

Associate an existing invoice to an appointment

1. **Create a new appointment (Section 3.1)** or open an existing appointment in the **Schedule** module.
2. Click the **Sales** tab.
3. **Add the attendee (Section 3.2)** to the appointment if not already associated with the appointment.
4. Click **Associate Existing Invoice** in the **Sales** group. A Select Invoice dialog will appear.
5. Select the invoice.
6. Click **OK.** You will see it on the **Sales** tab of the appointment.
7. Click **Save and Close**.

Remove an invoice from an appointment

1. Open the appointment from which the invoice should be removed.
2. Click the **Sales** tab.
3. Select the invoice.
4. Click **Remove Invoice** in the **Sales** group.
5. Click **Save and Close**.

> Removing an invoice from an appointment does not delete it.

3.4   Export your calendar into another program

You may want to view your AtHomesoft Strive calendar appointments in another scheduling program, such as Microsoft Outlook® or a mobile device. Your calendar can be exported from AtHomesoft Strive into iCalendar or vCalendar format and then that file can be used to import your appointments into your other program.

What would you like to do?

Learn about the export formats

Export your calendar appointments to iCalendar or vCalendar format

Learn about the export formats

iCalendar: A calendar format, which can be used by most scheduling applications to transfer appointments. The iCalendar format was based on the vCalendar format, but includes more information about the appointments. This format is sometimes called **iCal**.

vCalendar: Another calendar format, which was the predecessor to the iCalendar. This format is more widely accepted as an import format, but is less detailed.

If your other scheduling tool supports iCalendar imports, it is recommended to use the iCalendar format rather than the vCalendar format.

Export your calendar appointments to iCalendar or vCalendar format

You must first export your calendar to a iCalendar or vCalendar file, which then can be used to import into your other scheduling application. To export your calendar:

1. Click the **Application Button (Section 1.2)** in the left-hand corner of the title bar of the main application.

2. Select **Import/Export** and then **Export Calendar to iCalendar File** or **Export Calendar to vCalendar File**, depending on the format that is accepted by your other application.

3. Browse to the location where you would like to save the file.

4. Enter a name and click **Save**.

3.5   Send an email to appointment attendees

You may wish to email all attendees, including the hostess, of an appointment in order to communicate a change to it or to follow up with them after the appointment. To email all attendees and the hostess:

1. In the Schedule module select the appointment for which you would like to email the attendees.

2. Click **Email** in the **Appointment Actions** group.

3. An email will open using your default email client with the email addresses of all attendees and the hostess in the To field. Complete and send the email as normal.

8.2   Print Weekly Accomplishments Report

The Weekly Accomplishment report can be used to analyze your sales for any given week. It summarizes your sales and orders for the week, summarizes your year-to-date sales, and estimates your weekly gross profit. The second page of the report also includes spaces to indicate any information requests for your director and new or prospective team members.

You can also **Submit your Weekly Accomplishments to Mary Kay® InTouch® (Section 3.7)**.

What would you like to do?

Print the Weekly Accomplishments report

Learn how the Weekly Accomplishments report is populated

Print the Weekly Accomplishments Report

To print the Weekly Accomplishments report:

1. In the Schedule module, click **Weekly Accomplishments** in the **Common** group. The Weekly Accomplishments options dialog opens displaying the data that will print on the report. Many of the fields will be automatically populated, but some fields, such as Next Week's Goals, must be completed in this dialog in order to populate them on the report.

2. Select the **Week Ending Date** in the ribbon by using the drop-down. Or, select a **Custom Date Range** and click **Get History** to print the report for a time frame other than a week.

   All appointments and final invoices (not draft) are automatically populated in the grid on the **Sales** tab and all product orders appear on the **Orders** tab. You cannot add or remove rows directly in the **Sales** or **Orders** grids. You must add invoices, appointments, and orders in the Sales, Schedule, and Inventory applications.

   Appointments may include several contacts and invoices; they can be expanded by clicking

the plus symbol to the left of the row to view the detail.

3. You may modify any of the following fields for the appointments and invoices in the **Sales** grid:

    1. **Time (Hours):** Invoices that are not associated with an appointment will default to .5 hours. The actual duration of the appointment in the calendar is used if this item has been populated from an appointment.

    2. **Number of Bookings:** Indicate the number of future bookings that you have scheduled as a result of this appointment.

    3. **Number of Skin Care Sets Sold:** Indicate the number of skin care sets that you sold in the appointment.

        All other fields in the grid must be changed on the actual invoice or appointment in order to update the grid.

4. Complete the fields on the **Summary** tab.

    > The total sales for each type of appointment are automatically populated from the week's invoices and appointments. To change these figures, you must create invoices in the **Sales** application.
    >
    > Alternatively, you can export the report to Microsoft® Excel and modify the Excel spreadsheet. However, these changes will not update AtHomesoft Strive.

5. Click **Save** in the **Common** group.

6. Click **Print** in the **Common** group.

7. Click the print icon in the toolbar:

8. After sending the report to the printer, you can complete the **Additional Information Requests** and **New or Prospective Team Members** tables by checking the boxes for information requests and adding new and prospective team members.

Learn how the Weekly Accomplishments report is populated

The report is populated using your profile information, the week's invoices and appointments, and the contacts associated with those invoices and appointments. Some information must be entered directly in the Weekly Accomplishments dialog and some information must be manually completed after printing it.

The following information is used to populate the report:

*   Your name, consultant number, and other details from **Application Settings (Section 1.4)** are included in the top of the report. When in the Weekly Accomplishments dialog, click **Application Settings** in the **Common** group in order to view or modify these settings before printing the report.

*   The **Week's Activity** table (top-most table on the report) is populated with the following:

    o   If an invoice is associated with an appointment, it is included on the Weekly Accomplishments report in the column for that Type of appointment. For example, invoices associated with a **Facial (Selling)** appointment will have sales listed in the **Class/Facial Sales** column.

    o   The **Source** field on an invoice determines the column for which it applies.

    o   Any invoices that are not associated with an appointment are included with a default time, which is set on the **Sales/Orders** tab of **Application Settings (Section 1.4)**. You can change the hours.

    o   All appointments with no associated invoices appear on the report with the time of the appointment, but no sales.

    o   Tax from all invoices is included in the **Sales Tax** column.

    o   The value of any Section 2 products on an invoice appear in the **Hostess Gift/GWPAT (Section 2) Expenses** column.

    o   The value of discounts for Section 1 products and any Section 1 products given away appear in the **Product Given Away (Section 1) Expenses** column.

    o   The value of the non-recoverable sales tax for Section 1 discounts and product giveaways is listed in the **Non-recovered Sales Tax Expenses** column.

- The **Week's Activity Recap** table is on the **Summary** tab of the Weekly Accomplishments dialog and is populated with the following:
  - The **Number of Team Building Appointments** is defaulted from the number of appointments for the week with a type of **Team Building**. You can change this number in the Weekly Accomplishments dialog.
  - You must enter the **Number of New Team Members** on the **Summary** tab of the Weekly Accomplishments dialog.
  - The **Number of Selling Appointments for Next Week** is defaulted from the number of appointments for next week with a type that contains **(Selling)**. You can change this number in the Weekly Accomplishments dialog.
  - The rest of the fields in this table repeat the totals for all of the **Sales** columns in the **Week's Activity** table (top-most table on the report).
- The **Estimated Weekly Gross Profit** table is on the **Summary** tab of the Weekly Accomplishments dialog and is populated with the following:
  - The **Weekly Sales Total Less Tax** repeats the total for all of the **Sales** columns in the **Week's Activity** table (top-most table on the report).
  - The **Estimated Profit Percentage** is populated from the **Weekly Accomplishments** tab in **Application Settings (Section 1.4)**. When in the Weekly Accomplishments dialog, click **Application Settings** in the **Common** group in order to view or modify this setting before printing the report. You can also change this number for an individual report.
  - The **Estimated Weekly Gross Profit** is calculated by multiplying the **Weekly Sales Total Tax** and the **Estimated Profit Percentage.**
- The **This Week's Hourly Earnings** table is on the **Summary** tab of the Weekly Accomplishments dialog and is populated with the following:
  - The **Estimated Weekly Gross Profit** is repeated from the **Estimated Weekly Gross Profit** table.
  - The **Hours Worked** repeats the total **Time (Hours)** in the **Week's Activity** table (top-most table on the report). You can change this number in the Weekly Accomplishments dialog.
  - The **Total Earned per Hour** is calculated by dividing the **Estimated Weekly Gross Profit** by the **Hours Worked.**
- The **Orders Submitted to Company this Week** table is on the **Orders** tab of the Weekly Accomplishments dialog and is populated from orders entered in the **Inventory** application.
- The **Next Week's Goals** table is on the **Summary** tab of the Weekly Accomplishments dialog and must be entered in the dialog to populate the report.
- The **Additional Information Requests** and **New or Prospective Team Members** tables are not populated by AtHomesoft Strive. This information must be manually entered after printing the report.

3.7   Submit Weekly Accomplishments to InTouch®

You can export your Weekly Accomplishments into Mary Kay® InTouch® in order to submit them to your director. Your Weekly Accomplishments are calculated using your schedule, product orders and invoices. You can **modify your Weekly Accomplishments (Section 8.2)** before submitting them to InTouch or simply submit them without making any changes.

To submit your Weekly Accomplishments to InTouch®:

1. In the Schedule module, click on **Weekly Accomplishments** in the **Common** group of the menu.
2. Select the time frame for the Weekly Accomplishments that you would like to submit to InTouch®.
3. If desired, **modify your Weekly Accomplishments (Section 8.2)**.
4. Click **Submit to InTouch** in the **Common** group.
5. Log into InTouch®.
6. Click the **Go to Entry Page** button in the **Weekly Accomplishments** group of the menu.
7. Select the appropriate week in the InTouch® page.
8. Click the **Auto Fill** button in the **Weekly Accomplishments** group of the menu.
9. Validate the data that was populated.

10. Submit your accomplishments as you normally would on InTouch®.

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8.4   Print your appointments

You can print your appointments in a calendar or appointment list (tickler) format. The calendar format can be printed monthly, weekly or daily. To print your appointments:

1. Select the dates you would like to print by selecting the first date and while holding down the **Shift** key on the keyboard select the last date that you would like to print.

2. Select **Print Calendar** and then the type of report that you would like to print. Use Daily, Weekly and Monthly Styles to print in a calendar format. Use the Calendar Details Style to print an appointment list or tickler report.

4   Sales

4.1   Sales (invoice) overview

Create invoices to record sales and issue receipts to your clients. When you create a new invoice, items
in inventory are automatically removed from the Inventory module and out-of-stock items
are automatically added to **Products to Order** in the **Inventory (Section 5.1)** module. You can apply
payments (or refunds) and print the invoice.

When final, an invoice must be checked out in order to make payments toward it, adjust inventory levels
and update the customer balance.

What would you like to do?

Create a new invoice

Add payments to an invoice

Email an invoice to the customer

Print an invoice

Change a draft invoice

Return items for an invoice

Refund a customer

Void an invoice

Indicate that backordered products have been delivered to the customer

Void a payment

Create a new invoice

Invoices can be created in the Sales module or **from a contact in the Contacts module (Section
4.3)**.

To create a new invoice from Sales:

1. In the Sales module, click **New** in the **Common** group.

2. Select the contact from the **Select Contact** dialog or type in a new contact name if the contact
    doesn't already exist.

    > Use the **Filter** box in the upper right-hand corner to quickly find a contact in the list.

3. Click **OK**.

4. Select the **Create 2+2+2 Reminders** checkbox in the Options group in the ribbon if you would like
    three reminders automatically added to your calendar for this invoice. The reminders will be added 2
    days, 2 weeks, and 2 months from the invoice date. You can specify whether this checkbox is by
    default checked or unchecked in **Sales Application Settings (Section 1.4)**.

5. Add products to the grid using one of the following methods:

    1. Type the part of the product number name in the **Find** box above the grid.

    2. Select **Add From Customer History** in the **Product** group.

    3. Type a product number in the **Number** column of the grid or select it from the drop-down.

    4. Type a product name in the **Name** column of the grid or select it from the drop-down.

    5. Click **Find Product** in the **Product** group in the ribbon and use the **Find Product dialog
        (Section 5.3)**.

6. Change the quantity of each product if necessary.

7. If you add $40 or more worth of product to an invoice, you will be prompted to add a **free gift ('Add
    gift with purchase on invoice' in the on-line documentation)**. You will be able to select the
    product for the free gift from this prompt.

8. Enter a discount percentage or dollar amount for each individual product if desired, or enter a total
    discount for all products on the invoice in the **Discount** field in the footer of the dialog. You can also

change the **Price** of a product for this one invoice. If you would like to change the price of the product for all future invoices, then the price should be changed in the Product Catalog.

9. The **Invoice Date** defaults with today's date, but can be changed if desired.

10. Select the **Source** for this invoice, which is used on the **Weekly Accomplishments (Section 8.2)** report.

11. The **Comment** field is defaulted from the comment field in **Invoice Application Settings (Section 1.4)**, but can be changed for this one invoice.

12. The **Invoice Discount** is defaulted from the **Discount** field on the **Additional Information** tab on the contact, but can be changed for this one invoice.

13. Select if you would like sales tax to be calculated before or after the discount using the **Apply Tax** drop-down. This field is defaulted from the **Calculate invoice sales tax after discount** field in **Sales Application Settings (Section 1.4).**

14. The **Sales Tax** is defaulted from the **Sales Application Settings (Section 1.4)** unless you have entered a **Sales Tax** on the **Additional Information** tab of the contact. The tax can be changed for this one invoice.

15. Enter the **Shipping**.

16. Click the **Weekly Accomplishments Settings** tab in the footer of the dialog to select how this invoice should appear on the **Weekly Accomplishments report (Section 8.2)**. You can select the **Hostess**, **Time Spent in Hours**, **Bookings**, and **Skin Care Sets Sold**.

17. If you would like to finalize the invoice, click **Checkout** in the **Options** group in the ribbon.

> An invoice must be checked out before inventory levels are adjusted and the customer's balance is updated.
>
> Once an invoice has been checked out, you can select to edit it, but this will undo the checkout and place it back in the draft folder. All products will be automatically returned to your inventory.

18. Click **Add payments** in the **Options** group if you would like to add a payment now. The Add Payments dialog will open where you can enter any payments.

19. Click **Print** in the **Common** group to preview the invoice. From the preview, you can print it if desired.

20. Click **Email** to email the invoice to your customer. You will have an option to add a **Pay Now** link. See Email an Invoice to the Customer.

21. To immediately create a new product order for out-of-stock items, select the products and then click **New Product Order** in the **Invoice Detail Actions** group. These products can be automatically be added to a new order later by using the **Auto Fill** options.

22. Click **Save and Close**.

Find an invoice

To quickly find an invoice:

1. Select a category in the left-hand pane to filter records in the right-hand pane. The categories include:

    1. **Unpaid Invoices:** Contains all invoices that are checked out and are not paid in full.

    2. **Draft Invoices:** Contains all invoices that have not yet been checked out.

    3. **By Calendar Year:** Contains all invoices except draft invoices, grouped by year.

    4. **By Contact:** Contains all invoices except draft invoices, grouped by contact.

    5. **Payments:** This group contains payments towards invoices rather than the actual invoices.

2. Enter a part of the invoice's name, the name of the contact, date or amount in the **Filter data** field in the upper-right hand corner of the right-hand pane and click Enter. The right-hand pane will be filtered by any record in that category that contains that word or phrase. To clear the filter, click the **x** to the right of the field.

> You can click on any column heading in the grid to sort the list ascending by that column. To sort descending, click the same heading a second time.

Add payments to an invoice

After creating an invoice, you can immediately add a payment or add one at a later date. To immediately add the payment, refer to the steps in create a new invoice. To add a payment thereafter, select the invoice in the Sales module and click **Add Payment**. The **Add Payment** form will open.

To add a payment in the **Add Payment** form:

1. Select the appropriate **Payment Type**:

    1. **Cash**

    2. **Credit Card:** Select this payment type if you will be processing the credit card through Strive.

    3. **Check**

    4. **Online Payment:** Select this payment type if the customer paid for the invoice online or if she/he paid for it by credit card, but you do not want to process it through Strive.

2. Enter the **Amount** of the payment. The full amount of the invoice automatically defaults in this field, but you can change it to partially pay the invoice.

3. Click **Add**. The payment is added to the **Payment Summary** grid. You can enter multiple payments if the contact is using different methods to pay for the items. For example, the contact may want to pay for part of the invoice in cash and part by check.

4. Change the **Discount**, **Sales Tax**, or **Shipping and Handling** if necessary.

5. Click **Save and Print Invoice** to immediately print the invoice or **Save** if you would like to print the invoice later**.**

6. If a payment was made by credit card and you would like to process it through ProPay®, click the **Payments** group in the left-hand pane. Select the payment and select **Process Payment with ProPay®**.

> You must first configure your ProPay® account in **Application Settings (Section 1.4)** before processing credit card payments.
>
> You can process multiple payments at one time. To select multiple adjacent payments, select the first payment and then while holding the **Shift** key down, select the last payment you would like to process. To select non-adjacent payments, hold the **Ctrl** key down while selecting each payment that you would like to process.
>
> An internet connection is required to process payments through ProPay®.

Email an invoice to the customer

When you select to email an invoice, Strive automatically adds a PDF of the invoice as an attachment and adds the customer's email address to the email.

You have an option to include a Pay Now link in the invoice. When the customer clicks on the Pay Now link, she can pay her balance by clicking the link in the email. The money goes straight into your ProPay® account. Strive automatically checks for new payments when you open it and gives you an option to import them. You can also choose to manually check for new payments.

After creating an invoice, you can immediately email it or email it at a later date.   To immediately email it, refer to the steps in create a new invoice. To email it thereafter:

1. Select the invoice in the Sales module and click **Email Invoice**.

2. If the customer has a balance and you have a **ProPay® account setup in Application Settings (Section 1.4)**, another dialog will open asking if you would like to add a payment link to the email. You can change the payment amount if desired and click Yes to add the link. Otherwise, click No if you do not want to include a payment link.

3. An email will open with the invoice attached as a PDF and the customer's email in the To line. If you chose to add a payment link, it will be included in the body of the email. Type a message to your customer and send the email.

4. When your customer receives the email, she can click the payment link to pay her bill online. At that time, the money will be added to your ProPay® account, a confirmation email will be sent to her, and you will receive an email notification of the payment.

5. The next time you open Strive, your new payment will automatically be detected and you can import it into Strive. You can choose to check for new payments at any time by clicking **Check for Online Payments**.

6. If you have set up Strive to automatically expense ProPay payments, then a new expense will be automatically added to Strive.

Print the invoice

After creating an invoice, you can immediately print it or print it at a later date.   To immediately print it, refer to the steps in create a new invoice. To print it thereafter, select the invoice in the Sales module and click **View and Print Invoice**.

A preview of the invoice will appear in a separate dialog. You can print it by clicking the printer icon in the toolbar or email it by clicking **Send to** and then **Email Recipient as Attachment** in the **Common** group.

Payments can be added later. See add payment to an invoice.

Change a draft invoice

A draft invoice is an invoice that has not yet been checked out. Only draft invoices can be modified. If the invoice has been checked out, then you can void it if no payments have been made or create a new invoice for additional purchases. You can also select to return items for an invoice to automatically return the items to inventory or simply refund the contact.

To change a draft invoice:

1. In the left-hand pane of the Sales module, click **Unpaid Invoices**. The list of invoices appear on the right grouped by payment state.
2. Select the invoice in the right-hand pane.
3. Click **Edit Invoice** in the **Invoice Actions** group.
4. Make any desired changes and click **Save and Close**.
5. If you would like to finalize the invoice, click **Checkout**.

> An invoice must be checked out before inventory levels are adjusted and the customer's balance is updated.
>
> Once an invoice has been checked out, you can select to edit it, but this will undo the checkout and place it back in the draft folder. All products will be automatically returned to your inventory.

6. Click **Add payments** if you would like to add a payment now. The Add Payments dialog will open where you can enter any payments.
7. Click **Print or email the invoice** to preview the invoice. From the preview, you can print or email it.
8.   Click **Close** to the Complete Checkout dialog.

Checkout a draft invoice

An invoice must be checked out before inventory levels are adjusted and the customer's balance is updated.

Once an invoice has been checked out, you can select to edit it, but this will undo the checkout and place it back in the draft folder. All products will be automatically returned to your inventory.

To checkout a draft invoice:

1. Click the **Draft Invoices** group in the left-hand pane.
2. Select the invoice in the right-hand pane.
3. Click **Checkout** in the **Invoice Actions** group in the ribbon.
4. Click **Checkout** in the Complete Checkout dialog.
5. Click **Add payments** if you would like to add a payment now. The Add Payments dialog will open where you can enter any payments.
6. Click **Print or email the invoice** to preview the invoice. From the preview, you can print or email it.
7.   Click **Close** to the Complete Checkout dialog.

Return items for an invoice

To return items for an invoice:

1. In the left-hand pane of the Sales module, click **By Contact**. The list of invoices appear on the right grouped by contact.

2. Select the invoice in the right-hand pane.

3. Click **Return Items** in the **Invoice Actions** group.

4. A copy of the invoice will open with all products selected to be Returned to Inventory in the Type column.

5. Remove any products that will not be returned on this invoice by selecting the product and clicking **Remove Product** in the **Product** group.

6. Change the **Type** to **Return to Mary Kay*** if the product will be returned to Mary Kay® rather than returned to your inventory.

7. Change the **Quantity** to the number of items being returned for each product.

8. Change the date if it should be a different date than today.

9. Add a **Comment** if desired. This comment will print on the invoice.

10. Click **Save and Close**.

11. If you would like to finalize the invoice, click **Checkout**.

> An invoice must be checked out before a refund can be made towards it, inventory levels are adjusted and the customer's balance is updated.
>
> Once an invoice has been checked out, products cannot be added or removed from the invoice.

12. Click **Refund the customer** if you would like to issue a refund now. The Add Payments dialog will open where you can enter any refunds.

13. Click **Print or email the invoice** to preview the invoice. From the preview, you can print or email it.

14. Click **Create a replacement order** to **return any items to Mary Kay® (Section 6.3)**. The replacement order needs to be made for items returned to the company.

15. Click **Close** to the Complete Checkout dialog.

Refund a customer

After entering a return, you can immediately issue a refund or issue one at a later date. To immediately issue a refund when returning items, select **Save and Close** in the Invoice and then select **Checkout** and then **Refund the customer** when prompted. To issue a refund thereafter, select the invoice in the Sales module and click **Refund Customer**. The **Add Payment** form will open.

To add a refund in the **Add Payment** form:

1. Select the **Payment Type**.

2. The amount owed to the customer is by default in the **Amount** field. Change the amount if desired. Refunds should be a negative number.

3. Click **Add**. The refund is added to the **Payment Summary** grid.

4. Click **Save and Print Invoice** to immediately print the invoice or **Save** if you would like to print the invoice later**.**

Void an invoice

You can void an entire invoice if you have made a mistake and you would like to start over. You can also **return items (Section 4.1)**.

To void an invoice:

1. In the left-hand pane of the Sales module, click **By Contact**. The list of invoices appear on the right grouped by contact.

2. Select the invoice in the right-hand pane.

3. Click **Void Invoice** in the **Invoice Actions** group.

4. Answer **Yes** to confirm that the invoice should be voided.

Indicate that backordered products have been delivered to the customer

Products that have been included in an invoice, but were not in stock are placed in the **Customer Backorders** group in the left-hand pane. When you receive these products and deliver them, you should mark them as delivered.

To mark a backordered product as delivered:

1. Click on the **Customer Backorders** group in the left-hand pane.

2. Select the backordered products that have been delivered.

> You can select multiple adjacent products by first selecting the first product and holding down the Shift key while selecting the last product that should be included. To select multiple non-adjacent products, hold down the Ctrl key while selecting the individual products.

3. Click **Mark as Delivered** in the **Customer Backorder Actions** group. Those products will be removed from the Customer Backorders group.

Void a payment

To void a payment from a customer, which will change the contact's balance by the payment amount:

1. In the Sales module, click on the **Payments** group in the left-hand pane. A list of payments will be listed in the right-hand pane.

2. Select the payment you would like void.

3. Select **Void Payment** in the **Payment Actions** group. Depending on the type of payment you are voiding, follow the appropriate steps below.

    1. If you are voiding a payment made by cash or check, then answer **Yes** to the confirmation prompt.

    2. If you are voiding a credit card payment that you would like to refund through ProPay®, answer **Yes** to create a another credit card payment that is a negative of the next payment. You will need to [process this payment through ProPay](#) as normal.

    3. If you are voiding a credit card payment that you would *not* like to refund through ProPay®, answer **No.**

 * AtHomesoft Strive is not affiliated with Mary Kay®.

5.3   Find products for an invoice or product order

When creating a new invoice or product order, you can search for products by product name, number or line. AtHomesoft Strive finds the product on the Mary Kay® web site and inserts pricing information automatically.*

To find a product and insert it into your invoice or product order:

1. Click **Find Product** in the **Product** group.

2. Enter the product name or number in the **Search Criteria** field or select a product line using the **Product Category** field.

3. Click **Search**.

4. Highlight the desired products and click **Add** to add them to the invoice or product order.

5. After adding all products, close the form to complete the invoice or product order.

> To retrieve a list of all products, leave both the **Search Criteria** and **Product Category** fields blank and click **Search**.

*AtHomesoft is not affiliated with Mary Kay®.

4.3   Create a new invoice from a contact

You can quickly create an invoice from scratch or re-order previously purchased products from the

contact.

What would you like to do?

Create a new invoice from scratch from the contact

Re-order previously purchased products for a contact

Create a new invoice from scratch from the contact

1. In the left-hand pane of the Contacts module, click a category of the contact. The list of contacts will appear in the right-hand pane.

2. In the right-hand pane, select the contact for which you would like to create an invoice.

3. Select **New Invoice** from the **Contact Actions** group in the ribbon or from the right-click menu. The contact is automatically selected for the new invoice.

4. Complete the Invoice Detail form and print the invoice as normal.

You can also create a new invoice from the contact form when you have a contact already open by clicking on the application button and selecting **Invoice** from the **Create New Item** menu.

Re-order previously purchased products for a contact

You can start an invoice by selecting previously purchased products and then add additional products if desired.

1. In the left-hand pane of the Contacts module, click a category of the contact. The list of contacts will appear in the right-hand pane.

2. In the right-hand pane, select the contact for which you would like to create an invoice.

3. Click **Open Contact** in the **Contact Actions** group in the ribbon or from the right-click menu.

4. Select the **History** tab.

5. Click on the **Products** sub-tab.

6. Select the products that you would like to add to a new invoice for this contact.

> You can select multiple adjacent products by selecting the first contact and holding down the Shift key while selecting the last product that should be included. To select multiple non-adjacent products, hold down the Ctrl key while selecting the individual products.

7. Right-click on one of the selected products and select **New Invoice** from the menu. The new invoice will be automatically populated with the contact and the selected products.

8. Add additional products and complete the invoice as normal.

6.3   Create a product replacement order

Product replacement orders are used to return products to the company. When you **return items (Section 4.1)** and indicate that they should be returned to Mary Kay®, then you can select to create a product replacement order after checking the invoice out.* Otherwise, you can create one by clicking **Replace Products** in the Inventory or Product Catalog modules. The Product Replacement form opens.

The Product Replacement form has two grids: **Returned Items** and **Replacement Items**. The Returned Items grid contains the products that will be returned to the company, and the Replacement Items are the items that you will be ordering as a replacement for the ones returned. If this form was opened from the **Complete Checkout** dialog (the dialog that appears when you click **Save and Close** for an invoice), then the products are populated in both grids with those items which you indicated should be returned to the company.

To complete the form:

1. You can add items to either grid by:

    1. Using the **Number** drop-down in the appropriate grid.

    2. Using the **Name** drop-down in the appropriate grid.

    3. Clicking **Find Return Product** in the **Returns** group or the **Find Replacement Product** in the **Replacements** group and then using the search to **find the product (Section 5.3)**.

2. To remove a product from either grid, highlight it and use the **Remove Return Product** in the

Returns group or the **Remove Replacement Product** in the **Replacements** group.

3. Change the **Quantity** for products if necessary.

4. Click **Save and Close.**

5. You will receive a message stating that an order has been created for the replacement products. Click **Yes** to open the order form.

6. The normal **Product Order (Section 5.1)** form will open where you can make any desired changes.

> Replacement orders cannot be submitted online through AtHomesoft Strive. They must be entered manually; however, they should still be entered in Strive in order to keep inventory levels accurate.

* AtHomesoft Strive is not affiliated with Mary Kay®.

4.5   Automatically discount all new sales for a contact

You may offer your most loyal customers a standard discount. You can indicate this discount on the contact, so it is automatically added to all new invoices. You can change this discount amount at the time you create the invoice.

To indicate a discount for a contact:

1. In the left-hand pane of the Contacts module, click the category in which the contact exists. The list of contacts will appear in the right-hand pane.

2. Highlight the contact that you would like to add to your preferred customers.

3. Click **Open Contact** in the **Common** group.

4. Click on the **Additional Info** tab.

5. Enter a discount percentage in the **Discount** field. For example, to give a contact a 10% discount on all new invoices, enter 10.00.

6. Click **Save and Close** in the **Common** group.

7.4   Adjust contact's balance or indicate bad debt

You can manually change a contact's balance if you do not expect payment for that balance. Generally, there are two situations where you might adjust a contact's balance:

- **Small adjustments:** You may need to make small adjustments to contact balances from time-to-time. For example, if you incorrectly calculated the total of an invoice while with the customer and found that you undercharged her $1.50 when you enter the payment in Strive. Instead of maintaining such a small balance or asking the customer for payment, you may decide to simply reduce the contact's balance. *Small adjustments are treated in the same manner as discounts for tax purposes.*

- **Bad debt:** When you are unable to collect payment for a debt, you can write it off as a bad debt expense if you have appropriate documentation for that debt. For example, you could enter a bad debt expense for a returned check or declined credit card. *Bad debt is included as an expense for tax purposes.*

To adjust a contact's balance or indicate bad debt:

1. Select the contact in the Contact's module or the invoice in the Sales module for which the adjustment will be made.

2. Click **Balance Adjustment** in the ribbon.

3. Indicate the **Date** and **Amount** of the adjustment.

4. Select the **Type**. If you would like to make a small adjustment, select **Balance Adjustment**. If you would like to indicate bad debt, select **Bad Debt from Sales or Services**.

> For tax purposes, you must have appropriate documentation in order to claim a bad debt expense.

5. Enter a **Reason** for the adjustment.

6. Click **OK** to save the adjustment.

5   Inventory

5.1   Inventory overview

Use the inventory module to create product orders and view your inventory levels. An assisted ordering process is available for the Mary Kay® InTouch® website.*

What would you like to do?

Create a product order

Order the products online through the Mary Kay® InTouch® website

Receive products

Find a product order

Find products in stock, on order or that need to be ordered

Delete a product order

Create a product order

Use a product order whenever you will be ordering product from the company. You can either use the assisted ordering process for the Mary Kay® InTouch® website or manually order the products afterwards. Once the order is received, you must mark the products as received in order to update your inventory levels.

To create a new product order:

1. In the Inventory module, click **New**.

2. Add products in one of the following manners:

    1. Click **Auto Fill Order** and then **By Reorder Level** to automatically add any products that have been sold which were not in stock and products that are below the Reorder Level. The Reorder Level is set on the product record in the Product Catalog.

    2. Click **Auto Fill Order** and then **Replenish** to automatically add any products that you have sold since your last product order.

    3. Type part of the product number or name in the **Find** box above the grid.

    4. Type a product number in the **Number** column of the grid or select it from the drop-down.

    5. Type a product name in the **Name** column of the grid or select it from the drop-down.

    6. Click **Find Product** in the **Product** group in the ribbon and use the **Find Product dialog (Section 5.3)**.

    7. Click **Add All Active** and then **Section 1 Products** or **Section 2 Products** to add all products that are not discontinued. The products will be added with a quantity of 0. Use these options if you will be placing a really large order and you would like to just go through all active products in the catalog. After reviewing all the products and updating the quantity, you may want to click **Remove Products with 0 Qty** to de-clutter the order.

3. Change the **Qty** if necessary.

4. Add a **Description** if desired.

5. The **Supplier Discount** field defaults to from **Application Settings (Section 1.4)**, but you can change it.

6. The **Sales Tax** field is defaulted from **Application Settings (Section 1.4)**, but can be changed.

7. Enter the **Shipping and Handling** amount.

8. Click **Save and Close**.

9. The **Save Order Options** dialog opens. Select one of the following options:

    1. **Save Order and Submit Later**. This option will save a draft of the invoice. You must mark an order as submitted before you can mark it as received. You should select this option if you want to submit the order online later.

    2. **Save Order and Submit Manually.** Select this option if you will not be using the assisted order process, but will submit it manually instead

3. **Save Order and Submit Online.** Select this option to <u>order the products online</u> now.

10. When you receive the order, you must indicate that the products were <u>received</u>.

Order the products online through the Mary Kay® InTouch® website

AtHomesoft Strive can assist you with ordering your products through the Mary Kay® InTouch® website. You can initiate the online order by selecting **Place Order** and then **Online via InTouch®**. Alternatively, you can start an online order by selecting the draft invoice in the Inventory module and clicking **Submit Order Online** in the **Product Order Actions** group. The **Submit Order Online** dialog will open.

You will use the **Submit Order Online** dialog to order the products. This dialog has the **Web Browser** tab, which displays the Mary Kay InTouch® website. The **Product Order** tab is the normal Product Order dialog, which you can use as a reference when completing the order online.

To complete the product order:

1. Log into InTouch®.

2. Create a new product order as you normally would on the InTouch® website, including accepting the ordering guidelines and selecting your address.

3. Select to **Order by Part Number**.

4. Click **Fill Order** in the **Order Submit** group in the ribbon. The products and quantities will automatically be added and your shopping cart will display.

5. Complete the Checkout process as normal online.

6. If the **Shipping and Handling** charges are different than in your original product order, you can change the amount on the **Product Order** tab.

7. If you received any free products as a result of your order, you can add these to the **Product Order** tab.

> After you click **Fill Order**, any changes to the **Product Order** tab will not automatically be updated on the InTouch® website. If you add or remove products, you must do so in both places (on the website and on the **Product Order** tab).

8. Click **Save and Close.**

9. Answer **Yes** to the prompt to mark the order as submitted. It must be submitted in order to mark the products as received.

10. When you receive the order, you must indicate that the products were <u>received</u>.

Receive a product

When you receive products, you must mark them as received in AtHomesoft Strive in order update your inventory levels.

To mark a product as received:

1. In the Inventory module, select the **Open Orders** group in the left-hand pane.

2. Select the order that you have received in the right-hand pane.

3. Select **Receive Order** in the **Product Order Actions** group in the ribbon. The complete order opens in the **Product Order Receive** dialog.

4. Click **Receive All Products**.

5. If you received more or less of a product than originally ordered, change the quantity for that product. You can also replace products by using the **Replace Product** menu (e.g., if you received the wrong eye color, but decided to keep it).

6. You can change the **Date Received** if necessary.

7. Click **Save and Close**. If you didn't receive all of the products, then the order will remain in your Open Orders until you receive the rest of them.

Find a product order

To quickly find an product order:

1. Select a category in the left-hand pane to filter records in the right-hand pane. The categories

include:

1. **Draft Orders:** Contains all orders that have not been submitted either manually or online.
2. **Open Orders:** Contains all orders that have been submitted, but not yet fully received.
3. **Completed Orders:** Contains all orders that have been fully received.

3. Enter a part of the invoice's name, the name of the contact, date or amount in the **Filter data** field in the upper-right hand coner of the right-hand pane and click Enter. The right-hand pane will be filtered by any record in that category that contains that word or phrase. To clear the filter, click the **x** to the right of the field.

> You can click on any column heading in the grid to sort the list ascending by that column. To sort descending, click the same heading a second time.

Find products in stock, on order or that need to be ordered

The inventory module has views where you can view the products that you have in stock or on order and products that should be ordered. Use the following categories in the left-hand pane to view these products:

*   **Sold/Used Since Last Order:** Includes all products that you have sold or used (e.g., personal use items) since you last placed an order.
*   **Products To Order:** Includes any products that need to be ordered. Products are placed in this category if they are included in an invoice and you do not have them in stock or if the number you have in stock falls below the **Reorder Level** in the Product Catalog.
*   **Products On Order:** Includes any products that have been ordered, but not received.
*   **Products In Stock:** Includes all products that you currently have in stock.
*   **Inventory Adjustments:** Includes changes to in-stock products due to an inventory adjustment (e.g., consultant exchange or indicating products as damaged).

> All of these views except Inventory Adjustments can be toggled into **edit mode (Section 1.7)**, where you can change your in-stock or re-order level quantity directly in the grid.

Delete a product order

You can delete product orders. If you delete a completed order, then your inventory levels will be updated accordingly.

If you would like to simply remove products that have not yet been received from an existing order rather than delete the entire order, you can remove them when you receive your product order. To remove some products that you have already received, you can make an **inventory adjustment (Section 6.2)**.

To delete a product order:

1. In the Inventory module, select the category in the left-hand pane for this order.
2. Select the order that you would like to delete in the right-hand pane.
3. Click **Delete** in the **Product Order Actions** group in the ribbon.
4. Answer **Yes** to confirm the deletion.

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6.2   Adjust inventory

You may need to adjust your inventory to account for lost, stolen, damaged, or expired products. You may also exchange products with other consultants or use them yourself.

You can make inventory adjustments in either the Product Catalog or Inventory modules.

You can adjust inventory by using the Inventory Adjustments menu as described in this Help topic. Alternatively, you can also adjust inventory by placing the grid in the Product Catalog or the product grids in the Inventory module into **edit mode (Section 1.7)**.

What would you like to do?

[Indicate that products were used in a demo](#)

[Remove personal use products from inventory](#)

[Remove expired products from inventory](#)

[Exchange products with another consultant](#)

[Remove damaged products from inventory](#)

[Remove lost or stolen items from inventory](#)

[Physical inventory count](#)

[Create a product replacement order](#)

Indicate that products were used in a demo

When you use items in a facial or demos, you must remove them from your inventory by following the below steps:

1. In the Inventory module, select **Inventory Adjustments** and then **Demo Use** from the **Common** group in the ribbon. Or, in the Product Catalog module, select **Inventory Adjustments** and then **Demo Use** from the **Product Actions** group in the ribbon.

2. The **Inventory Adjustments** dialog will open. Add products to the grid by using one of the following methods:

   1. Type a product number in the **Number** column of the grid or select it from the drop-down.
   2. Type a product name in the **Name** column of the grid or select it from the drop-down.
   3. Type the product number or part of the name in the **Find** box above the grid.
   4. Click **Find Product** in the **Product** group in the ribbon and use the **Find Product dialog (Section 5.3)**.

3. Enter the number of products that you used in the demo in the **Demo Use Qty** field.

4. Change the **Date** if desired.

5. Enter a **Reason**.

6. Click **Save and Close.**

Remove personal use products from inventory

Products that you personally use must be removed from your inventory using the following steps:

1. In the Inventory module, select **Inventory Adjustments** and then **Personal Use** from the **Common** group in the ribbon. Or, in the Product Catalog module, select **Inventory Adjustments** and then **Personal Use** from the **Product Actions** group in the ribbon.

2. The **Inventory Adjustments** dialog will open. Add products to the grid by using one of the following methods:

   1. Type a product number in the **Number** column of the grid or select it from the drop-down.
   2. Type a product name in the **Name** column of the grid or select it from the drop-down.
   3. Type the product number or part of the name in the **Find** box above the grid.
   4. Click **Find Product** in the **Product** group in the ribbon and use the **Find Product dialog (Section 5.3)**.

3. Enter the number of products that you used in the **Personal Use Qty** field.

4. Change the **Date** if desired.

5. Enter a **Reason**.

6. Click **Save and Close.**

Remove expired products from inventory

Remove products that have expired by following the below steps:

1. In the Inventory module, select **Inventory Adjustments** and then **Expired Date Code** from the **Common** group in the ribbon. Or, in the Product Catalog module, select **Inventory Adjustments** and then **Expired Date Code** from the **Product Actions** group in the ribbon.

2. The **Inventory Adjustments** dialog will open. Add products to the grid by using one of the following methods:

    1. Type a product number in the **Number** column of the grid or select it from the drop-down.

    2. Type a product name in the **Name** column of the grid or select it from the drop-down.

    3. Type the product number or part of the name in the **Find** box above the grid.

    4. Click **Find Product** in the **Product** group in the ribbon and use the **Find Product dialog (Section 5.3)**.

3. Enter the number of products that you used in the **Expired Date Code Qty** field.

4. Change the **Date** if desired.

5. Enter a **Reason**.

6. Click **Save and Close.**

Exchange products with another consultant

You may occasionally swap products with another consultant. To update your inventory after a consultant exchange:

1. In the Inventory module, select **Inventory Adjustments** and then **Consultant Exchange** from the **Common** group in the ribbon. Or, in the Product Catalog module, select **Inventory Adjustments** and then **Consultant Exchange** from the **Product Actions** group in the ribbon.

2. Select the consultant from the contact list. If the consultant isn't already in your contacts, you can quickly add him or her by typing a first and last name in the **Create New Contact** section at the bottom.

3. Click **OK.**

4. The **Inventory Adjustments** dialog will open. Add products to the grid by using one of the following methods:

    1. Type a product number in the **Number** column of the grid or select it from the drop-down.

    2. Type a product name in the **Name** column of the grid or select it from the drop-down.

    3. Type the product number or part of the name in the **Find** box above the grid.

    4. Click **Find Product** in the **Product** group in the ribbon and use the **Find Product dialog (Section 5.3)**.

5. Indicate the quantity of the product that you have given to the other consultant in the **Out** column and quantity of the product that you have received in the **In** column. For example, if you gave a consultant brown eyeliner in exchange for black eyeliner, then you would add both eyeliners to the grid with a 1 in the **In** column for the black eyeliner and a 1 in the **Out** column for the brown one.

6. Change the **Date** if desired.

7. Enter a **Reason**.

8. Click **Save and Close.**

Remove damaged products from inventory

Remove products that are damaged by following the below steps:

1. In the Inventory module, select **Inventory Adjustments** and then **Damaged** from the **Common** group in the ribbon. Or, in the Product Catalog module, select **Inventory Adjustments** and then **Damaged** from the **Product Actions** group in the ribbon.

2. The **Inventory Adjustments** dialog will open. Add products to the grid by using one of the following methods:

    1. Type a product number in the **Number** column of the grid or select it from the drop-down.

    2. Type a product name in the **Name** column of the grid or select it from the drop-down.

    3. Type the product number or part of the name in the **Find** box above the grid.

    4. Click **Find Product** in the **Product** group in the ribbon and use the **Find Product dialog (Section 5.3)**.

3. Enter the number of products that you used in the **Damaged Qty** field.

4. Change the **Date** if desired.

5. Enter a **Reason**.

6. Click **Save and Close.**

Remove lost or stolen items from inventory

You may find that you have fewer items in stock then included in AtHomesoft Strive. You can mark the missing products as lost or stolen by following the below steps:

1. In the Inventory module, select **Inventory Adjustments** and then **Lost or Stolen** from the **Common** group in the ribbon. Or, in the Product Catalog module, select **Inventory Adjustments** and then **Lost or Stolen** from the **Product Actions** group in the ribbon.

2. The **Inventory Adjustments** dialog will open. Add products to the grid by using one of the following methods:

   1. Type a product number in the **Number** column of the grid or select it from the drop-down.
   2. Type a product name in the **Name** column of the grid or select it from the drop-down.
   3. Type the product number or part of the name in the **Find** box above the grid.
   4. Click **Find Product** in the **Product** group in the ribbon and use the **Find Product dialog (Section 5.3)**.

3. Enter the number of products that you used in the **Lost or Stolen Qty** field.

4. Change the **Date** if desired.

5. Enter a **Reason**.

6. Click **Save and Close.**

Physical inventory count

Use the physical inventory count when you initially enter your inventory levels and to bulk update your inventory periodically. For example, you may want to physically count your inventory and update it at the end of every year.

To perform a physical inventory count:

1. In the Inventory module, select **Inventory Adjustments** and then **Physical Inventory Count** from the **Common** group in the ribbon. Or, in the Product Catalog module, select **Inventory Adjustments** and then **Physical** from the **Product Actions** group in the ribbon.

2. The **Inventory Adjustments** dialog will open with a list of all products that you have in stock. Physically count each of your products.

3. If you have more or less of a product, then you can change the **New On Hand Qty** to the total number of items you have in stock. Alternatively, you can enter the difference between the amount you have in stock and the amount listed on the dialog in the **Change Quantity**. For example, if you have 5 lotions in stock, but there were 7 in AtHomesoft Strive, you could enter 5 in the New On Hand Qty field or you could enter -2 in the Change Quantity field.

4. If you have a product in stock that is not in the list, you can add products by using one of the following methods:

   1. Type a product number in the **Number** column of the grid or select it from the drop-down.
   2. Type a product name in the **Name** column of the grid or select it from the drop-down.
   3. Type the product number or part of the name in the **Find** box above the grid.
   4. Click **Find Product** in the **Product** group in the ribbon and use the **Find Product dialog (Section 5.3)**.

5. Change the **Inventory Date** if desired.

6. Enter a **Reason**.

7. Click **Save and Close.**

Create a product replacement order

You may need to return products to your supplier in exchange for other products. For detailed steps, see **Create a product replacement order (Section 6.3)**.

5.3 Find products for an invoice or product order

When creating a new invoice or product order, you can search for products by product name, number or line. AtHomesoft Strive finds the product on the Mary Kay® web site and inserts pricing information automatically.*

To find a product and insert it into your invoice or product order:

1. Click **Find Product** in the **Product** group.

2. Enter the product name or number in the **Search Criteria** field or select a product line using the **Product Category** field.

3. Click **Search**.

4. Highlight the desired products and click **Add** to add them to the invoice or product order.

5. After adding all products, close the form to complete the invoice or product order.

> To retrieve a list of all products, leave both the **Search Criteria** and **Product Category** fields blank and click **Search**.

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6.3 Create a product replacement order

Product replacement orders are used to return products to the company. When you **return items (Section 4.1)** and indicate that they should be returned to Mary Kay®, then you can select to create a product replacement order after checking the invoice out.* Otherwise, you can create one by clicking **Replace Products** in the Inventory or Product Catalog modules. The Product Replacement form opens.

The Product Replacement form has two grids: **Returned Items** and **Replacement Items**. The Returned Items grid contains the products that will be returned to the company, and the Replacement Items are the items that you will be ordering as a replacement for the ones returned. If this form was opened from the **Complete Checkout** dialog (the dialog that appears when you click **Save and Close** for an invoice), then the products are populated in both grids with those items which you indicated should be returned to the company.

To complete the form:

1. You can add items to either grid by:

    1. Using the **Number** drop-down in the appropriate grid.

    2. Using the **Name** drop-down in the appropriate grid.

    3. Clicking **Find Return Product** in the **Returns** group or the **Find Replacement Product** in the **Replacements** group and then using the search to **find the product (Section 5.3)**.

2. To remove a product from either grid, highlight it and use the **Remove Return Product** in the **Returns** group or the **Remove Replacement Product** in the **Replacements** group.

3. Change the **Quantity** for products if necessary.

4. Click **Save and Close.**

5. You will receive a message stating that an order has been created for the replacement products. Click **Yes** to open the order form.

6. The normal **Product Order (Section 5.1)** form will open where you can make any desired changes.

> Replacement orders cannot be submitted online through AtHomesoft Strive. They must be entered manually; however, they should still be entered in Strive in order to keep inventory levels accurate.

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5.5 Import an order from InTouch

You can import new and historical orders from Mary Kay® InTouch into Strive.

If you import an order as a new order, the order will be placed in the **Open Orders** category, and you must mark it as **received** when it is delivered to you. At that point, your inventory levels will be updated.

Historical orders are used to import orders you made prior to using Strive. If you import an order as an historical order, the order will be placed in the **Completed Orders** category and your inventory levels will *not* be updated.

What would you like to do?

Import a new order

Import an historical order

Import a new order

To import a new order for which your inventory levels should be updated when you receive it:

1. In the Inventory module, click **Import InTouch Order** and then **Import NEW order from InTouch**.

2. Log into InTouch®.

3. Navigate to an existing order by clicking on a hyperlink.

4. Click **Import Order** from the toolbar. The Product Order form will display with the products.

5. Verify that the order is correct.

6. Click **Save and Close**.

7. When you receive the order, mark it as **received (Section 5.1)** in Strive to update your inventory.

Import an historical order

To import an historical order for which your inventory levels will not be updated:

1. In the Inventory module, click **Import InTouch Order** and then **Import historical order from InTouch**.

2. Log into InTouch®.

3. Navigate to an existing order by clicking on a hyperlink.

4. Click **Import Order** from the toolbar. The Product Order form will display with the products.

5. Verify that the order is correct.

6. Click **Save and Close.**

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6.4   Split packaged product

You may purchase some products in a package, but sell or give away the individual products in that package separately to customers. For example, you may purchase Preferred Customer Program gifts in a pack of 5, but you give them away individually. In order to correctly add an individual product from a package onto an invoice and correctly update your inventory, the package must be split into individual products.

You must first mark a product as a packaged product and then you can transfer the package contents into individual products. The current Gift with Purchase product is automatically marked as a packaged product, so you must only distribute it into individual products.

> Splitting up a package product is different than **splitting up a set ('Configure and manage product sets' in the on-line documentation)**. A set is a group of related products that are sometimes sold together and a packaged product is a group of the same product that you receive in a package, but always give away or sell separately.

What would you like to do?

[Mark a product as a packaged product](#)

[Distribute a packaged product into individual products](#)

Mark a product as a packaged product

When you mark a product as a packaged product you can immediately distribute the contents of that package into the individual products. Thereafter, you can easily distribute packages into individual products. The current Gift with Purchase product is automatically marked as a packaged product, so you must only [distribute it into individual products](#).

To mark a product as a packaged product and distribute its contents to individual products:

1. In the Product Catalog, select the packaged product that should be split into individual products.

2. Click **Mark As Packaged Product** in the **Product Actions** group.

3. Enter the number of products in the package in the **Package Quantity** field.

4. If you already have a product in the catalog for the individual product, click the **Find Product** button in the **Individual Product** section and select a product. If you would like to create a new product, complete the fields in the **Individual Product** section for the new product.

    > If you use the **Find Product** button to select an existing product, double-check the wholesale and retail price to ensure they are correct. You may need to re-enter the number of products in the package in the **Package Quantity** field.

5. Click **Next**.

6. Use the **Add** button to split a package into individual products. Use the **Subtract** button to move individual products back into a package.

7. Click **Finish**.

Distribute a packaged product into individual products

Once you have marked a product as a packaged product, you can distribute the contents of that product into individual products by:

1. In the Product Catalog, select the packaged product that should be split into individual products.

2. Click **Distribute Packaged Quantity** in the **Product Actions** group.

3. Use the **Add** button to split a package into individual products. Use the **Subtract** button to move individual products back into a package.

4. Click **OK**.

6 Product Catalog

6.1 Product Catalog overview

The Product Catalog lists all of the products, which are available for selection on invoices and product orders. Every time the AtHomesoft Strive is launched and an internet connection is available, it will check online for any new catalog updates and will update your catalog if required. A picture is included for each product, but you can turn off the picture in **Application Settings (Section 1.4)** if you notice poor performance.

Several years of discontinued products are included in the Product Catalog; however, you can hide any discontinued and out-of-stock products by checking the **Hide out-of-stock discontinued products** checkbox above the grid.

What would you like to do?

Find a product

Indicate the reorder level of a product

Add a product

Change the price of a product

Create a product replacement order

Delete a product

Find a product

There are two methods to quickly find a product:

1. Click on the **All** group in the left-hand pane. Enter a part of the product's name, number, retail price, or section in the **Filter data** field in the upper-right hand coner of the right-hand pane and click Enter. The right-hand pane will be filtered by any record that contains that word or phrase. To clear the filter, click the **x** to the right of the field.

2. Select a category in the left-hand pane to filter records in the right-hand pane. The categories include:

   o **All:** Contains all products in the Product Catalog.

   o **Product Lines:** Each product line has it's own category, which includes only the products in that line. Timewise® and Velocity® are examples of Mary Kay® product lines.

   o **Product Types:** Each product is categorized by the type of product, for example, Oil Control or Lip Liner.

   o **Uncategorized:** Contains any products that are not categorized.

   o **Discontinued:** Contains any product that has been discontinued.

> Products may be located in several categories. For example, many products belong to a product line and product type category.
>
> You can click on any column heading in the grid to sort the list ascending by that column. To sort descending, click the same heading a second time.

Indicate the reorder level of a product

You can indicate the minimum acceptable quantity in stock of a product, or **Reorder Level**, to ensure that your inventory is always stocked with certain items. When you **select to auto-fill a product order (Section 5.1)**, any products below the reorder level will automatically be added to the product order.

To indicate the reorder level:

1. In the Product Catalog module, select the product that you would like to add a reorder level.

2. Select **Open Product** from the **Product Actions** group in the ribbon.

3. Enter a **Reorder Level**.

4. Click **Save and Close**.

> You can quickly change the reorder level of many products at one time by **editing directly in the grid (Section 1.7)**.

Add a product

You can manually add a product if it isn't listed in your product catalog. Before adding a product, you should search in the All category to ensure that you are not adding a duplicate.

To add a product:

1. In the Product Catalog module, click **New** in the **Common** group in the ribbon.
2. Click on the picture to add a picture of the product if desired.
3. Enter the **Number**, **Name**, and **Description** of the product.
4. Enter the **Reorder Level**.
5. Enter the **Wholesale** and **Retail** prices.
6. Enter a **Discount %** or **Dollar** amount if it is currently on sale.
7. If the product is a Section 2 product, change the **Section** to **2**.
8. If the product is not taxable, uncheck the **Taxable** checkbox.
9. If the product is discontinued, check the **Discontinued** checkbox.
10. Click **Save and Close**.

Change the price of a product

You can change the retail or wholesale value of a product:

1. In the Product Catalog module, select the product that you would like to change.
2. Select **Open Product** from the **Product Actions** group in the ribbon.
3. Change the retail or wholesale value of a product if desired. These changes will affect the price of the product on your product orders and invoices.
4. Click **Save and Close**.

Change In-stock or Reorder Quantity

You can quickly change the in-stock or reorder quantity for products in the grid by toggling the grid into **edit mode (Section 1.7)** and changing these quantities directly in the grid.

Create a product replacement order

You may need to return products to your supplier in exchange for other products. For detailed steps, see **Create a product replacement order (Section 6.3)**.

Delete a product

1. In the Product Catalog module, select the product that you would like to delete.
2. Select **Delete** from the **Product Actions** group in the ribbon.
3. Answer **Yes** to confirm the deletion.

Create a new product order or invoice

You can create a new product order or invoice from the Product Catalog as well as the Inventory and Sales modules.

To create a new product order or invoice:

1. In the Product Catalog module, select the products that you would like to add to the invoice or product order.

> You can select multiple adjacent products by first selecting the first product and holding down the Shift key while selecting the last product that should be included. To select multiple non-adjacent products , hold down the Ctrl key while selecting the individual products.

2. Click **New Invoice** or **New Product Order** from the **Product Actions** group. If you are adding an invoice, you will be prompted to select a contact. When the Product Order or Invoice form opens, the selected products will automatically default in the form. Complete the **invoice (Section 4.1)** or **product order (Section 5.1)** as normal.

6.2   Adjust inventory

You may need to adjust your inventory to account for lost, stolen, damaged, or expired products. You may also exchange products with other consultants or use them yourself.

You can make inventory adjustments in either the Product Catalog or Inventory modules.

You can adjust inventory by using the Inventory Adjustments menu as described in this Help topic. Alternatively, you can also adjust inventory by placing the grid in the Product Catalog or the product grids in the Inventory module into **edit mode (Section 1.7)**.

What would you like to do?

Indicate that products were used in a demo

Remove personal use products from inventory

Remove expired products from inventory

Exchange products with another consultant

Remove damaged products from inventory

Remove lost or stolen items from inventory

Physical inventory count

Create a product replacement order

Indicate that products were used in a demo

When you use items in a facial or demos, you must remove them from your inventory by following the below steps:

1. In the Inventory module, select **Inventory Adjustments** and then **Demo Use** from the **Common** group in the ribbon. Or, in the Product Catalog module, select **Inventory Adjustments** and then **Demo Use** from the **Product Actions** group in the ribbon.

2. The **Inventory Adjustments** dialog will open. Add products to the grid by using one of the following methods:
   1. Type a product number in the **Number** column of the grid or select it from the drop-down.
   2. Type a product name in the **Name** column of the grid or select it from the drop-down.
   3. Type the product number or part of the name in the **Find** box above the grid.
   4. Click **Find Product** in the **Product** group in the ribbon and use the **Find Product dialog (Section 5.3)**.

3. Enter the number of products that you used in the demo in the **Demo Use Qty** field.
4. Change the **Date** if desired.
5. Enter a **Reason**.
6. Click **Save and Close.**

Remove personal use products from inventory

Products that you personally use must be removed from your inventory using the following steps:

1. In the Inventory module, select **Inventory Adjustments** and then **Personal Use** from the **Common** group in the ribbon. Or, in the Product Catalog module, select **Inventory Adjustments** and then **Personal Use** from the **Product Actions** group in the ribbon.

2. The **Inventory Adjustments** dialog will open. Add products to the grid by using one of the following methods:

   1. Type a product number in the **Number** column of the grid or select it from the drop-down.
   2. Type a product name in the **Name** column of the grid or select it from the drop-down.
   3. Type the product number or part of the name in the **Find** box above the grid.
   4. Click **Find Product** in the **Product** group in the ribbon and use the **Find Product dialog (Section 5.3)**.

3. Enter the number of products that you used in the **Personal Use Qty** field.
4. Change the **Date** if desired.
5. Enter a **Reason**.
6. Click **Save and Close.**

Remove expired products from inventory

Remove products that have expired by following the below steps:

1. In the Inventory module, select **Inventory Adjustments** and then **Expired Date Code** from the **Common** group in the ribbon. Or, in the Product Catalog module, select **Inventory Adjustments** and then **Expired Date Code** from the **Product Actions** group in the ribbon.

2. The **Inventory Adjustments** dialog will open. Add products to the grid by using one of the following methods:

   1. Type a product number in the **Number** column of the grid or select it from the drop-down.
   2. Type a product name in the **Name** column of the grid or select it from the drop-down.
   3. Type the product number or part of the name in the **Find** box above the grid.
   4. Click **Find Product** in the **Product** group in the ribbon and use the **Find Product dialog (Section 5.3)**.

3. Enter the number of products that you used in the **Expired Date Code Qty** field.
4. Change the **Date** if desired.
5. Enter a **Reason**.
6. Click **Save and Close.**

Exchange products with another consultant

You may occasionally swap products with another consultant. To update your inventory after a consultant exchange:

1. In the Inventory module, select **Inventory Adjustments** and then **Consultant Exchange** from the **Common** group in the ribbon. Or, in the Product Catalog module, select **Inventory Adjustments** and then **Consultant Exchange** from the **Product Actions** group in the ribbon.

2. Select the consultant from the contact list. If the consultant isn't already in your contacts, you can quickly add him or her by typing a first and last name in the **Create New Contact** section at the bottom.

3. Click **OK.**

4. The **Inventory Adjustments** dialog will open. Add products to the grid by using one of the following methods:

   1. Type a product number in the **Number** column of the grid or select it from the drop-down.
   2. Type a product name in the **Name** column of the grid or select it from the drop-down.
   3. Type the product number or part of the name in the **Find** box above the grid.
   4. Click **Find Product** in the **Product** group in the ribbon and use the **Find Product dialog (Section 5.3)**.

5. Indicate the quantity of the product that you have given to the other consultant in the **Out** column and quantity of the product that you have received in the **In** column. For example, if you gave a consultant brown eyeliner in exchange for black eyeliner, then you would add both eyeliners to the grid with a 1 in the **In** column for the black eyeliner and a 1 in the **Out** column for the brown one.

6. Change the **Date** if desired.

7. Enter a **Reason**.

8. Click **Save and Close.**

Remove damaged products from inventory

Remove products that are damaged by following the below steps:

1. In the Inventory module, select **Inventory Adjustments** and then **Damaged** from the **Common** group in the ribbon. Or, in the Product Catalog module, select **Inventory Adjustments** and then **Damaged** from the **Product Actions** group in the ribbon.

2. The **Inventory Adjustments** dialog will open. Add products to the grid by using one of the following methods:

    1. Type a product number in the **Number** column of the grid or select it from the drop-down.

    2. Type a product name in the **Name** column of the grid or select it from the drop-down.

    3. Type the product number or part of the name in the **Find** box above the grid.

    4. Click **Find Product** in the **Product** group in the ribbon and use the **Find Product dialog (Section 5.3)**.

3. Enter the number of products that you used in the **Damaged Qty** field.

4. Change the **Date** if desired.

5. Enter a **Reason**.

6. Click **Save and Close.**

Remove lost or stolen items from inventory

You may find that you have fewer items in stock then included in AtHomesoft Strive. You can mark the missing products as lost or stolen by following the below steps:

1. In the Inventory module, select **Inventory Adjustments** and then **Lost or Stolen** from the **Common** group in the ribbon. Or, in the Product Catalog module, select **Inventory Adjustments** and then **Lost or Stolen** from the **Product Actions** group in the ribbon.

2. The **Inventory Adjustments** dialog will open. Add products to the grid by using one of the following methods:

    1. Type a product number in the **Number** column of the grid or select it from the drop-down.

    2. Type a product name in the **Name** column of the grid or select it from the drop-down.

    3. Type the product number or part of the name in the **Find** box above the grid.

    4. Click **Find Product** in the **Product** group in the ribbon and use the **Find Product dialog (Section 5.3)**.

3. Enter the number of products that you used in the **Lost or Stolen Qty** field.

4. Change the **Date** if desired.

5. Enter a **Reason**.

6. Click **Save and Close.**

Physical inventory count

Use the physical inventory count when you initially enter your inventory levels and to bulk update your inventory periodically. For example, you may want to physically count your inventory and update it at the end of every year.

To perform a physical inventory count:

1. In the Inventory module, select **Inventory Adjustments** and then **Physical Inventory Count** from the **Common** group in the ribbon. Or, in the Product Catalog module, select **Inventory Adjustments** and then **Physical** from the **Product Actions** group in the ribbon.

2. The **Inventory Adjustments** dialog will open with a list of all products that you have in stock. Physically count each of your products.

3. If you have more or less of a product, then you can change the **New On Hand Qty** to the total number of items you have in stock. Alternatively, you can enter the difference between the amount

you have in stock and the amount listed on the dialog in the **Change Quantity**. For example, if you have 5 lotions in stock, but there were 7 in AtHomesoft Strive, you could enter 5 in the New On Hand Qty field or you could enter -2 in the Change Quantity field.

4. If you have a product in stock that is not in the list, you can add products by using one of the following methods:

    1. Type a product number in the **Number** column of the grid or select it from the drop-down.

    2. Type a product name in the **Name** column of the grid or select it from the drop-down.

    3. Type the product number or part of the name in the **Find** box above the grid.

    4. Click **Find Product** in the **Product** group in the ribbon and use the **Find Product dialog (Section 5.3)**.

5. Change the **Inventory Date** if desired.

6. Enter a **Reason**.

7. Click **Save and Close.**

Create a product replacement order

You may need to return products to your supplier in exchange for other products. For detailed steps, see **Create a product replacement order (Section 6.3)**.

6.3   Create a product replacement order

Product replacement orders are used to return products to the company. When you **return items (Section 4.1)** and indicate that they should be returned to Mary Kay®, then you can select to create a product replacement order after checking the invoice out.* Otherwise, you can create one by clicking **Replace Products** in the Inventory or Product Catalog modules. The Product Replacement form opens.

The Product Replacement form has two grids: **Returned Items** and **Replacement Items**. The Returned Items grid contains the products that will be returned to the company, and the Replacement Items are the items that you will be ordering as a replacement for the ones returned. If this form was opened from the **Complete Checkout** dialog (the dialog that appears when you click **Save and Close** for an invoice), then the products are populated in both grids with those items which you indicated should be returned to the company.

To complete the form:

1. You can add items to either grid by:

    1. Using the **Number** drop-down in the appropriate grid.

    2. Using the **Name** drop-down in the appropriate grid.

    3. Clicking **Find Return Product** in the **Returns** group or the **Find Replacement Product** in the **Replacements** group and then using the search to **find the product (Section 5.3)**.

2. To remove a product from either grid, highlight it and use the **Remove Return Product** in the **Returns** group or the **Remove Replacement Product** in the **Replacements** group.

3. Change the **Quantity** for products if necessary.

4. Click **Save and Close.**

5. You will receive a message stating that an order has been created for the replacement products. Click **Yes** to open the order form.

6. The normal **Product Order (Section 5.1)** form will open where you can make any desired changes.

> Replacement orders cannot be submitted online through AtHomesoft Strive. They must be entered manually; however, they should still be entered in Strive in order to keep inventory levels accurate.

 * AtHomesoft Strive is not affiliated with Mary Kay®.

6.4   Split packaged product

You may purchase some products in a package, but sell or give away the individual products in that

package separately to customers. For example, you may purchase Preferred Customer Program gifts in a pack of 5, but you give them away individually. In order to correctly add an individual product from a package onto an invoice and correctly update your inventory, the package must be split into individual products.

You must first mark a product as a packaged product and then you can transfer the package contents into individual products. The current Gift with Purchase product is automatically marked as a packaged product, so you must only distribute it into individual products.

> Splitting up a package product is different than **splitting up a set ('Configure and manage product sets' in the on-line documentation)**. A set is a group of related products that are sometimes sold together and a packaged product is a group of the same product that you receive in a package, but always give away or sell separately.

What would you like to do?

Mark a product as a packaged product

Distribute a packaged product into individual products

Mark a product as a packaged product

When you mark a product as a packaged product you can immediately distribute the contents of that package into the individual products. Thereafter, you can easily distribute packages into individual products. The current Gift with Purchase product is automatically marked as a packaged product, so you must only distribute it into individual products.

To mark a product as a packaged product and distribute its contents to individual products:

1.   In the Product Catalog, select the packaged product that should be split into individual products.

2.   Click **Mark As Packaged Product** in the **Product Actions** group.

3.   Enter the number of products in the package in the **Package Quantity** field.

4.   If you already have a product in the catalog for the individual product, click the **Find Product** button in the **Individual Product** section and select a product. If you would like to create a new product, complete the fields in the **Individual Product** section for the new product.

> If you use the **Find Product** button to select an existing product, double-check the wholesale and retail price to ensure they are correct. You may need to re-enter the number of products in the package in the **Package Quantity** field.

5.   Click **Next**.

6.   Use the **Add** button to split a package into individual products. Use the **Subtract** button to move individual products back into a package.

7.   Click **Finish**.

Distribute a packaged product into individual products

Once you have marked a product as a packaged product, you can distribute the contents of that product into individual products by:

1.   In the Product Catalog, select the packaged product that should be split into individual products.

2.   Click **Distribute Packaged Quantity** in the **Product Actions** group.

3.   Use the **Add** button to split a package into individual products. Use the **Subtract** button to move individual products back into a package.

4.   Click **OK**.

7   Finances

7.1   Finance overview

The Finance module is used to track your business expenses, non-sales income, and mileage. Before adding expenses and non-sales income, you must create expense categories and income categories.

What would you like to do?

Create an expense category

Create an income category

Enter an expense

Automatically expense ProPay® finance charges

Enter non-sales income

Find a previously recorded expense or non-sales income

Create an expense category

Expense categories are used to classify your business expenses. Examples of expense categories are telephone bills, accounting fees, and advertising. You must create expense categories before you can enter expenses.

> **Mileage (Section 7.2)** is logged separately than other expenses.

To add a new expense category:

1.   In the Finance module, click **New Expense Category** in the **Common** group in the ribbon.
2.   Type a **Name**.
3.   Type a **Description** if desired.
4.   Click **OK** to save it. You can now use this category to enter new expenses.

Create an income category

Income categories are used to classify your non-sales income. Examples of income categories are prizes and commissions. You must create income categories before you can enter non-sales income.

To create a new income category:

1.   In the Finance module, click **New Income Category** in the **Common** group in the ribbon.
2.   Type a **Name**.
3.   Type a **Description** if desired.
4.   Click **OK** to save it. You can now use this category to enter new non-sales income.

Enter an expense

You enter all of your business expenses in the same manner except for **mileage (Section 7.2)**, which is tracked separately. Strive can also automatically expense your ProPay® finance charges.

To enter an expense:

1.   In the Finance module, click **New Expense** in the **Common** group in the ribbon.
2.   The **Date** defaults to today. Change it if necessary.
3.   Select a **Payment Method.**
4.   Enter the person or business to which the expense was paid. Your previous entries for the **Paid To** field are automatically added to the drop-down, so you can quickly re-select a person or business.
5.   Enter a **Reference**, such as an invoice number.
6.   Select a **Category**. You must create an expense category before recording any expenses for it.

7. Enter the **Amount** of the expense.

8. Enter any additional notes in the **Memo** field.

9. Click **Save and Close** in the **Common** group in the ribbon if you will not be adding any more expenses. Click **Save and New** to save this expense and immediately add another expense.

Automatically expense ProPay® finance charges

You can configure Strive to create an expense for ProPay processing fees each time a credit card is processed. You enable this feature as well as configure the fees in **Application Settings overview (Section 1.4)**.

Enter non-sales income

You should record any income that is not the result of the sale of a product as non-sales income.

To add non-sales income:

1. In the Finance module, click **New Non-sales Income** in the **Common** group in the ribbon.

2. The **Date** defaults to today. Change it if necessary.

3. Select a **Payment Method.**

4. Enter the person or business from which you received the income. Your previous entries for the **Paid By** field are automatically added to the drop-down, so you can quickly re-select a person or business.

5. Enter a **Reference**.

6. Select a **Category**. You must create an income category before recording any income from it.

7. Enter the **Amount** of the expense.

8. Enter any additional notes in the **Memo** field.

9. Click **Save and Close** in the **Common** group in the ribbon if you will not be adding any more expenses. Click **Save and New** to save this expense and immediately add another expense.

Find a previously recorded expense or non-sales income

To quickly find an expense or non-sales income, click on the **Expenses** or **Income** group in the left-hand pane. Enter a part of the name, amount, memo or date in the **Filter data** field in the upper-right hand coner of the right-hand pane and click Enter. The right-hand pane will be filtered by any record that contains that word or phrase. To clear the filter, click the **x** to the right of the field.

To find an expense or income category, click on the **Finance Categories** group in the left-hand pane. The categories are automatically grouped by expense and income categories. Look in the appropriate group to find your category.

> You can click on any column heading in the grid to sort the list ascending by that column. To sort descending, click the same heading a second time.

7.2   Log mileage

Mileage can be entered using a regular form or a spreadsheet.

What would you like to do?

Enter mileage using a regular form

Enter mileage using the spreadsheet

Enter mileage using a regular form

If you are only recording one or two trips, you may want to use the regular form rather than the spreadsheet form.

To enter mileage using a regular form:

1. In the Finance module, click **Enter Mileage** in the **Common** group of the ribbon.

2. Select **Form** from the drop-down.

3. The **Date** will default to today. Change it if necessary.

4. Enter the **Start** location. If the start location is a contact's house, you can click **Find contact** next to the Start field to select the contact and automatically default the contact's address. Previously entered start locations automatically appear in the drop-down for quick re-selection.

5. Enter the **End** location. If the end location is a contact's house, you can click **Find contact** next to the End field to select the contact and automatically default the contact's address. Previously entered start locations automatically appear in the drop-down for quick re-selection.

6. Check **Round Trip** to automatically include both directions in the mileage calculation.

7. Click **Calculate Distance** if you would like AtHomesoft Strive to automatically calculate the mileage for you. Otherwise, enter the **Total Miles**.

8. Enter **Notes** if desired.

9. Click **Save and Close** if you will not be recording any more mileage or **Save and New** to enter another trip.

Enter mileage using the spreadsheet

If you are logging several trips, you may find that it is easier to enter it in a spreadsheet rather than a regular form.

To enter mileage using the spreadsheet:

1. In the Finance module, click **Enter Mileage** in the **Common** group of the ribbon.

2. Select **Spreadsheet** from the drop-down.

3. Enter the **Start** location. If the start location is a contact's house, you can click **Find Contact Address** in the **Starting Location** group in the ribbon. Previously entered start locations automatically appear in the drop-down for quick re-selection.

4. Enter the **End** location. If the end location is a contact's house, you can click **Find Contact Address** in the **Ending Location** group in the ribbon. Previously entered end locations automatically appear in the drop-down for quick re-selection.

5. The **Date** will default to today. Change it if necessary.

6. Enter **Notes** if desired.

7. Check **Round Trip** to automatically include both directions in the mileage calculation.

8. Click **Calculate Distance** in the **Online Tools** group in the ribbon if you would like AtHomesoft Strive to automatically calculate the mileage for you. Otherwise, enter the **Total Miles**.

9. After logging all of your trips, click **Save and Close**.

Find a previously recorded trip

To quickly find a previously recorded trip, click on the **Mileage** group in the left-hand pane of the Finance module. Enter a part of the name, date, notes or total miles in the **Filter data** field in the upper-right hand coner of the right-hand pane and click Enter. The right-hand pane will be filtered by any record that contains that word or phrase. To clear the filter, click the **x** to the right of the field.

7.3   Year-end and tax procedures

At the end of the year, you should do a physical inventory count and make any necessary adjustments to your inventory in Strive. Counting your actual inventory will ensure that any product losses throughout the year are taken into consideration when calculating your Cost of Goods Sold (COGS), which is used for tax purposes.

Once those adjustments have been made to your inventory, the **Income Statement** report can be printed for tax purposes. This report includes all necessary financial information to complete Schedule C for the United States IRS form 1040.

What would you like to do?

Make adjustments to inventory after a physical inventory count

Make adjustments to inventory after a physical inventory count

The easiest way to adjust your inventory is by **editing your Quantity In Stock directly in the Product Catalog grid (Section 1.7)**, but you can also make adjustments using the **Physical Inventory Count Inventory Adjustment in the Inventory module (Section 6.2)**.

> The inventory adjustment date should be the last day of the year to ensure that your Ending Inventory is correct on the Income Statement.

Print the Income Statement report

Strive calculates your profit or loss for the year using your sales and expenses that have been tracked in Strive. However, you may have additional financial data in another program that should be included in the profit/loss calculation. The Income Statement report includes a wizard where you can add that additional financial data in order to include it in the report. You can click **Finish** at any time in the wizard to print the report.

Many of the fields in the wizard include help text, which gives you more information on that particular field. These fields have the information icon, ⓘ, next to the label that displays the help text when you hover over it with the mouse.

Some fields in the wizard also include more detail on how they were calculated. These fields have the calculator icon, 🖩, next to the calculated field. When you hover over the icon with your mouse, detailed information on the calculation appears.

In Steps 2 - 4 of the wizard, you can see your **Tentative Profit (Loss)** at the top of the dialog. As you make changes to the financial data your profit or loss will be recalculated and updated in that field.

To print the Income Statement report:

1. In the **Finances** module, select **Finances Reports** and then **Income Statement** from the Common group in the ribbon.

2. Select the date range for the report in Step 1 and click **Next** to proceed to Step 2: Net Sales Calculation and Income.

3. If you have any sales or income that is not recorded in Strive, you can enter an additional amount in the **Additional Amount** field and Strive will automatically calculate the **Total** for the year. Alternatively, if you know the total amount of your sales or income for the year, you can enter it in the **Total** field and Strive will automatically calculate the **Additional Amount.**

4. Click **Next** to proceed to Step 3: Cost of Goods Sold (COGS).

5. If you purchased Strive mid-year, you will need to enter your **Beginning Inventory**.

6. For each of the items used in the COGS calculation, you can enter an **Additional Amount** or change the **Total** for the year in order to include financial information that has been tracked outside of Strive.

7. Click **Next** to proceed to Step 4: Expenses.

8. The **Sales Tax Rate for Period** is defaulted from the **Sales Tax** in **Application Settings (Section 1.4)**. Change the **Sales Tax Rate for Period** if necessary. This rate is used to calculate the **Expected Tax** for the period.

9. For each of the items used in the Expenses calculation, you can enter an **Additional Amount** or change the **Total** for the year in order to include financial information that has been tracked outside of Strive.

10. Click **Finish** to print the Income Statement report. Strive saves all of the information that you entered for that time period. To make changes or view the report again, simply use the same date range.

7.4   Adjust contact's balance or indicate bad debt

You can manually change a contact's balance if you do not expect payment for that balance. Generally, there are two situations where you might adjust a contact's balance:

- **Small adjustments:** You may need to make small adjustments to contact balances from time-to-time. For example, if you incorrectly calculated the total of an invoice while with the customer and

found that you undercharged her $1.50 when you enter the payment in Strive. Instead of maintaining such a small balance or asking the customer for payment, you may decide to simply reduce the contact's balance. *Small adjustments are treated in the same manner as discounts for tax purposes.*

- **Bad debt:** When you are unable to collect payment for a debt, you can write it off as a bad debt expense if you have appropriate documentation for that debt. For example, you could enter a bad debt expense for a returned check or declined credit card. *Bad debt is included as an expense for tax purposes.*

To adjust a contact's balance or indicate bad debt:

1. Select the contact in the Contact's module or the invoice in the Sales module for which the adjustment will be made.

2. Click **Balance Adjustment** in the ribbon.

3. Indicate the **Date** and **Amount** of the adjustment.

4. Select the **Type**. If you would like to make a small adjustment, select **Balance Adjustment**. If you would like to indicate bad debt, select **Bad Debt from Sales or Services**.

> For tax purposes, you must have appropriate documentation in order to claim a bad debt expense.

5. Enter a **Reason** for the adjustment.

6. Click **OK** to save the adjustment.

8 Reporting

8.1 Account Summary Report

The account summary report includes vital information about a contact, including his/her balance, contact information, and recent purchases and payments.

To print the Account Summary Report:

1. In the left-hand pane of the Contacts module, click the category in which the contact exists. The list of contacts will appear in the right-hand pane.

2. Highlight the contact in the right-hand pane.

3. Click **View Account Summary** in the **Contact Actions** group. By default, the contact's last 10 transactions are displayed, but you can customize the report by selecting a time frame from the **Quick History** drop-down in the ribbon. Alternatively, you can enter a date range in the **Filter by Date** group in the ribbon and selecting **Get History.**

8.2 Weekly Accomplishments

The Weekly Accomplishment report can be used to analyze your sales for any given week. It summarizes your sales and orders for the week, summarizes your year-to-date sales, and estimates your weekly gross profit. The second page of the report also includes spaces to indicate any information requests for your director and new or prospective team members.

You can also **Submit your Weekly Accomplishments to Mary Kay® InTouch® (Section 3.7)**.

What would you like to do?

Print the Weekly Accomplishments report

Learn how the Weekly Accomplishments report is populated

Print the Weekly Accomplishments Report

To print the Weekly Accomplishments report:

1. In the Schedule module, click **Weekly Accomplishments** in the **Common** group. The Weekly Accomplishments options dialog opens displaying the data that will print on the report. Many of the fields will be automatically populated, but some fields, such as Next Week's Goals, must be completed in this dialog in order to populate them on the report.

2. Select the **Week Ending Date** in the ribbon by using the drop-down. Or, select a **Custom Date Range** and click **Get History** to print the report for a time frame other than a week.

   All appointments and final invoices (not draft) are automatically populated in the grid on the **Sales** tab and all product orders appear on the **Orders** tab. You cannot add or remove rows directly in the **Sales** or **Orders** grids. You must add invoices, appointments, and orders in the Sales, Schedule, and Inventory applications.

   > Appointments may include several contacts and invoices; they can be expanded by clicking the plus symbol to the left of the row to view the detail.

3. You may modify any of the following fields for the appointments and invoices in the **Sales** grid:

   1. **Time (Hours):** Invoices that are not associated with an appointment will default to .5 hours. The actual duration of the appointment in the calendar is used if this item has been populated from an appointment.

   2. **Number of Bookings:** Indicate the number of future bookings that you have scheduled as a result of this appointment.

   3. **Number of Skin Care Sets Sold:** Indicate the number of skin care sets that you sold in the appointment.

      All other fields in the grid must be changed on the actual invoice or appointment in order to update the grid.

4. Complete the fields on the **Summary** tab.

> The total sales for each type of appointment are automatically populated from the week's invoices and appointments. To change these figures, you must create invoices in the **Sales** application.
>
> Alternatively, you can export the report to Microsoft® Excel and modify the Excel spreadsheet. However, these changes will not update AtHomesoft Strive.

5. Click **Save** in the **Common** group.

6. Click **Print** in the **Common** group.

7. Click the print icon in the toolbar:

8. After sending the report to the printer, you can complete the **Additional Information Requests** and **New or Prospective Team Members** tables by checking the boxes for information requests and adding new and prospective team members.

Learn how the Weekly Accomplishments report is populated

The report is populated using your profile information, the week's invoices and appointments, and the contacts associated with those invoices and appointments. Some information must be entered directly in the Weekly Accomplishments dialog and some information must be manually completed after printing it.

The following information is used to populate the report:

- Your name, consultant number, and other details from **Application Settings (Section 1.4)** are included in the top of the report. When in the Weekly Accomplishments dialog, click **Application Settings** in the **Common** group in order to view or modify these settings before printing the report.

- The **Week's Activity** table (top-most table on the report) is populated with the following:

  ○ If an invoice is associated with an appointment, it is included on the Weekly Accomplishments report in the column for that Type of appointment. For example, invoices associated with a **Facial (Selling)** appointment will have sales listed in the **Class/Facial Sales** column.

  ○ The **Source** field on an invoice determines the column for which it applies.

  ○ Any invoices that are not associated with an appointment are included with a default time, which is set on the **Sales/Orders** tab of **Application Settings (Section 1.4)**. You can change the hours.

  ○ All appointments with no associated invoices appear on the report with the time of the appointment, but no sales.

  ○ Tax from all invoices is included in the **Sales Tax** column.

  ○ The value of any Section 2 products on an invoice appear in the **Hostess Gift/GWPAT (Section 2) Expenses** column.

  ○ The value of discounts for Section 1 products and any Section 1 products given away appear in the **Product Given Away (Section 1) Expenses** column.

  ○ The value of the non-recoverable sales tax for Section 1 discounts and product giveaways is listed in the **Non-recovered Sales Tax Expenses** column.

- The **Week's Activity Recap** table is on the **Summary** tab of the Weekly Accomplishments dialog and is populated with the following:

  ○ The **Number of Team Building Appointments** is defaulted from the number of appointments for the week with a type of **Team Building**. You can change this number in the Weekly Accomplishments dialog.

  ○ You must enter the **Number of New Team Members** on the **Summary** tab of the Weekly Accomplishments dialog.

  ○ The **Number of Selling Appointments for Next Week** is defaulted from the number of appointments for next week with a type that contains **(Selling)**. You can change this number in the Weekly Accomplishments dialog.

  ○ The rest of the fields in this table repeat the totals for all of the **Sales** columns in the **Week's Activity** table (top-most table on the report).

- The **Estimated Weekly Gross Profit** table is on the **Summary** tab of the Weekly Accomplishments dialog and is populated with the following:

  ○ The **Weekly Sales Total Less Tax** repeats the total for all of the **Sales** columns in the **Week's**

Activity table (top-most table on the report).

○ The **Estimated Profit Percentage** is populated from the **Weekly Accomplishments** tab in **Application Settings (Section 1.4)**. When in the Weekly Accomplishments dialog, click **Application Settings** in the **Common** group in order to view or modify this setting before printing the report. You can also change this number for an individual report.

○ The **Estimated Weekly Gross Profit** is calculated by multiplying the **Weekly Sales Total Tax** and the **Estimated Profit Percentage.**

- The **This Week's Hourly Earnings** table is on the **Summary** tab of the Weekly Accomplishments dialog and is populated with the following:

○ The **Estimated Weekly Gross Profit** is repeated from the **Estimated Weekly Gross Profit** table.

○ The **Hours Worked** repeats the total **Time (Hours)** in the **Week's Activity** table (top-most table on the report). You can change this number in the Weekly Accomplishments dialog.

○ The **Total Earned per Hour** is calculated by dividing the **Estimated Weekly Gross Profit** by the **Hours Worked.**

- The **Orders Submitted to Company this Week** table is on the **Orders** tab of the Weekly Accomplishments dialog and is populated from orders entered in the **Inventory** application.

- The **Next Week's Goals** table is on the **Summary** tab of the Weekly Accomplishments dialog and must be entered in the dialog to populate the report.

- The **Additional Information Requests** and **New or Prospective Team Members** tables are not populated by AtHomesoft Strive. This information must be manually entered after printing the report.

8.3   Contact Mailing Labels

You can quickly create mailing labels with 6, 10, 20, 30, or 80 labels per sheet and print them using Avery® sheets.

To create mailing labels:

1. In the left-hand pane of the Contacts module, click the category in which the contacts exist. The list of contacts will appear in the right-hand pane.

> If the desired contacts are not in the same category, select the **All Contacts** item in the left-hand pane.

2. In the right-hand pane, select the contacts for which you would like to create mailing labels.

> You can select multiple adjacent contacts by selecting a contact and holding down the Shift key while selecting the last contact that should be included. To select multiple non-adjacent contacts, hold down the Ctrl key while selecting the individual contacts.

3. Click **Create Mailing Labels** in the **Contact Actions** group.

4. Select the appropriate format from the **Format** group.

5. Since the last page of the mailing labels may not use all of the mailing labels in a sheet, you may wish to print duplicate labels to complete the page. In this case, select **Repeat to End** and then **Refresh** in the **Options** group.

6. You may not want to start printing on the first label if you have partially used a sheet. To start on a different number, enter the number of the start label in the **Start At** field and then click **Refresh** in the **Options group.** Labels are counted across from left to right and then down.

7. Place the appropriate Avery mailing label sheets in the printer.

8. Click the Print button in the report toolbar.

9. Select the desired print options and click Print.

8.4   Print your appointments

You can print your appointments in a calendar or appointment list (tickler) format. The calendar format

can be printed monthly, weekly or daily. To print your appointments:

1. Select the dates you would like to print by selecting the first date and while holding down the **Shift** key on the keyboard select the last date that you would like to print.

2. Select **Print Calendar** and then the type of report that you would like to print. Use Daily, Weekly and Monthly Styles to print in a calendar format. Use the Calendar Details Style to print an appointment list or tickler report.