



## Vendio Customer Manager - Get Started List

*Last updated: 8/2/04.*

Get started with Vendio Customer Manager in five easy steps.

Before you begin, decide if you want to change your email address at eBay, PayPal, and other marketplaces, or keep your current email address. You can keep your current email address if your current email provider allows Mail Forwarding, or if you have your own email domain. Note that if you decide to change your email address, it will become, 'yourVendioUserID@vendio.com'.

### **Step One: Change Your Email Address or Keep Your Current Address**

If you choose to change your email address:

- Login, and click the Customer Manager Tab located in the left navigation bar.
- Find the QuickStart Checklist at the bottom of the page and click on 'eBay'.
- Follow the instructions to change your email address at eBay, and close the window when you are finished.
- Click on PayPal and follow the instructions to change your email address. Close the window when you are finished.
- Change your email address at other marketplaces, such as Yahoo and Amazon, if applicable.

If you choose to keep your current address:

- Login, and click the Customer Manager Tab.
- Find the QuickStart Checklist at the bottom of the page and click on 'Auto-Forward'. Follow the instructions on how to get your email forwarded, and close the window when you are finished. Keep in mind that there is a drawback to having your email forwarded. The reply-to address for emails sent out of Customer Manager will be the vendio.com email address, not your forwarding email address.
- If you want to use your own email domain, click on 'Email Domains', then click the 'Sign Up' button, which will take you to the Add an Email Domain page. Follow the instructions to add your domain so it will work with Customer Manager.

### **Step Two: Import Winning Bidders from Your Auctions**

Now that you have changed or kept your existing email address, you will want to import all past customer and transaction data so you can begin efficiently identifying and communicating with your customers.

- From the QuickStart Checklist, click on 'Import'.
- At the bottom of the window, click the 'Import' button to import all customer and transaction data from Sales Manager. As soon as the import is complete, you will have a record of every customer, email address, and eBay, Yahoo, Amazon, and Vendio Store transaction you have completed with them.

### **Step Three: Organize Customer Email Addresses**

Now that all of your customer and transaction data has been imported into Customer Manager, organize each customer into groups to identify and communicate with them more efficiently in the future. The Customers and Mailing Lists pages linked from the left navigation bar in Customer Manager will assist you with this.

- Click on 'Customers' in the left navigation bar. This is where all of the customers imported from Sales Manager will appear. Any new items launched with Sales Manager

in the future that close with a winning bidder will automatically be imported into your customer database.

- Manually add any additional customers you may want to communicate with in the future.
- You can sort customers alphabetically by Full Name and Email Address, and by Customer Rating. Note that the customer rating is assigned to customers depending on your own criteria (e.g. Your best customers get five stars, and so on). If you click on a customer's name, you can view their transaction history, as well as edit their information, such as email, home, and work address, phone number, customer rating, mailing list membership, and comments.
- Click on 'Mailing Lists' in the left navigation bar. This is where you can organize customers into groups to identify and communicate with them more efficiently later on.
- Click the 'New' button to create a mailing list. Enter a name and description for your mailing list, and add the appropriate members to the list (e.g. Name your mailing list 'Silver Jewelry', click the 'Add' button, and add all of the customers who have purchased silver jewelry from you in the past).
- Now that you have created a mailing list, if you ever want to offer a special promotion or new merchandise to a group of customers, select the checkbox to the left of the mailing list name and click the 'Send Email' button to begin composing your email.

#### **Step Four: Create Inboxes, Filters, and Responses**

You can set up Inboxes, Filters, and Responses to help save time organizing and answering incoming emails. Vendio helps you create a sample Inbox, Filter, and Response so you can set up your own much easier.

- From the QuickStart Checklist, click on 'Create'. Review the sample Inbox, Filter, and Response that appear in the window. Click the 'Create Samples' button at the bottom of the page so Vendio can import these examples directly into your Customer Manager.
- From the left navigation bar, click on 'Inboxes'. You'll notice that Vendio has imported a sample Inbox for you. You can select the checkbox to the left of the Inbox name and click the 'Edit' button to change its name and description. Click the 'New' button to create additional Inboxes, which will help you organize and prioritize incoming emails efficiently.
- From the left navigation bar, click on 'Filter'. You'll notice that Vendio has imported a sample Filter for you. You can select the checkbox to the left of the Filter name and click the 'Edit' button to change its name, rules and actions. Filters are often used to separate and organize marketplace notifications, payment notifications, and customer inquiries into your Inboxes. Click the 'New' button to begin creating your own Filters as they best apply to your incoming customer emails.
- From the left navigation bar, click on 'Responses'. You'll notice that Vendio has imported a sample Response for you. You can select the checkbox to the left of the Response name and click the 'Edit' button to change its name, description, and message. Click the 'New' button to begin creating your own Responses as they best apply to your commonly asked questions.

#### **Step Five: Set your Vendio Email Address**

You'll need to set your Sales Manager Post Sale messages to originate from your Customer Manager Vendio address. This will allow you to receive all replies to these messages in your Customer Manager account.

- From the QuickStart Checklist, click on 'Set Your Vendio Email Address'. Follow the instructions in the window to change your email address with Vendio.

If you need more help, please visit the Customer Manager [FAQ Section](#), or view the [Tutorial](#).

*Last updated: 8/2/04.*