

Matheson Quick Tips 2

To Submit Customer Order*:

- My Customers > Submit Customer Order
- Select Product > Check Out
- Enter Info or Add from Address Book

To Edit Customer Info/Change Shipment*:

- My Customers > Edit Customer Account
- Enter Info > Process Search > Select ARO

Contact Dist. Sup. about Specific Customer 24/7

- Select ARO (see edit above)
- Click “please email change” link

To Add New Prospect to Address Book:

- My Prospects > Add New Prospect
- Fill in Form > Save



To Add Customers/Distributors to Address Book:

- My Customers > Customer Search & Follow-Up ~OR~ My Team Data > Search My Team
- Run Report > Add to Address Book
- Select Names > Add to Address Book


Advanced Customer Search:

- My Customers > Customer Search & Follow-Up
- Advance Customer Search

Personalized Research Summary:

- Tools > JP+ Materials > Brochure & Pubs
- Create Research Sum. (top left corner)
- Select Flyer > Enter Info > Save
- Print  or Save  for later (email, etc.)

Search Online Owner's Manual*:

- Owner's Manual > Search 
(VOM PDF also avail. under Training Menu)

Get Team Member Information:

- My Team Data > Search My Team
- Select Pertinent Info > Run Report

Previous Month-End PVC Report:

- Home Page > My Current Month
- My Business & Team at a Glance
- Previous Month End PVC report

Send Email or E-Card to Group of Contacts:

- My Customers > Customer Search & Follow-Up ~OR~ My Team Data > Search My Team
- Select Pertinent Information > View Webpage format > Run Report
- Select Recipients > Click to Compose/Create
- Compose Email/Create Card > Send

Search for Events by State or Zip

- Events > Events Schedule
- Begins with > State Abbreviation

Save Audio Files to Computer

- Find Audio File > Right Click on File
- Save Target As > (Select Save Location and File Name) > Save

Check Status of Order:

- My Team > Order Analysis
- Select Order Type > Run Report
- Click Customer Sales Order Number

Sign-Up For or Access VoiceCom Features

- Tools > Forms & Applications
- Voice-Com > Login (10 digit VC# & Pswd)
- Setup > My Options

To Get Started:

- **Take the NSA Online Tour**
- **Submit Customer Order** (you can play around with all the options without actually placing an order).
- **Edit Customer Account** (where you can change contact information, delay, expedite or cancel shipments and much more).

If you can be comfortable doing these 3 tasks you can run your business efficiently and effectively using the NSA Online Office. The rest of the website is golden nuggets there for the taking!

Explore and Have Fun!