

Beauty Advisor

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Beauty Advisor - exports

Screenshot_2020-04-29_at_19.1

Getting started

The administrative panel allows the following actions:

- export of BA consultants
- export of BA customers
- export of BA orders

Descriptions of each of the above have been included in the following chapters of the article.

info2.svg **Remember**

Export - an operation that allows to generate data stored in the administration panel, to a file, usually with the extensions .xlsx or .csv, which can be downloaded to a local disk.

info2.svg **Remember**

For basic information on BA commerce, see the article [Beauty Advisor - getting started](#).

Table of contents:

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Screenshot_2020-04-29_at_19.1

Export of BA consultants

BA consultants can be exported by navigating to the section **Import / Export > Export / POS Users (1)**. Navigating to the tab will automatically initiate the export operation and you will receive a screen with a summary of the performed operation and the option to download the finished file **(2)** to a local disk.

Screen_with_a_summary_of_the_export_operation.png

Screen with a summary of the export operation

The generated file contains the following data. A description of each parameter can be found in the article [Beauty Advisor - mass imports](#) (chapter: "Mass Update of BA Consultants").

- **id**
- **first_name**
- **last_name**
- **email**
- **mobile**
- **active**
- **last_login_date**
- **group_name**
- **pos_reports_number**
- **ba_pos_number**
- **default_altshop_id**

Screenshot_2020-04-29_at_19.1

Export of BA customers

The export of BA customers is possible in the section **Import / Export > Export / contacts**. Due to the current limitations when exporting Excel files, there are two possible types of exports (export in full version **(2)** and in lite version **(3)**). Each export type is described in the following chapter.

Current exports are limited to approximately 100,000 rows. This limit will be extended with subsequent updates.

In the **Filters** tab **(1)**, the scope of the generated data can be narrowed down as needed. For a description of the parameters in the tab, see the article [Beauty Advisor > Contacts - viewing and managing BA clients](#). The table and possible actions in the tab **Beauty Advisor / Contacts** are described in the article [Beauty Advisor > Contacts - viewing and managing BA clients](#).

Section_Import_Export__Export__contacts.png

Section Import/Export > Export / contacts

Full export version

The full version generates all BA customer data available in the panel. Below you will find a list of parameters included in the generated export file. Each parameter is described in the article [Beauty Advisor - mass imports](#) (chapter: "Mass update of BA customers").

- **LAST_CUSTOMER_CODE**
- **FIRST_NAME**
- **NAME**
- **PHONE**
- **ACTUAL_SHOP**
- **RANKING**
- **CITY**
- **POSTAL_CODE**
- **STREET1**
- **HOUSE_NUMBER**
- **BOX_NUMBER**
- **EMAIL**
- **DATE_BIRTH**
- **LPD_BA**
- **LPD_ECOMMERCE**
- **LPD_RETAIL**
- **LA**
- **ID**
- **TOP1_TO_PRODUCT**
- **TOP1_TO_PRODUCT_LABEL**
- **TOP1_TO_LPD_TXT**
- **TOP1_TO_PRODUCT_PRICE**
- **TOP1_TO_TO**

- **TOP1_TO_QT**

Lite version

The generated file in the lite version contains four columns with data of BA customers. Below you will find a list of parameters included in the generated export file. Each parameter is described in the article [Beauty Advisor - mass imports](#) (chapter: "Mass update of BA customers").

- **ACTUAL_SHOP**
- **RANKING**
- **LPD_RETAIL**
- **ID**

Screenshot_2020-04-29_at_19.1

Export of BA orders

There are two types of NA order exports (export in full version and in lite version). Each type is described in the chapter below.

Full export version

A full version of the export of BA orders is possible in the section **Beauty Advisor > Orders / list**, by selecting the **Export to XLSX** button **(1)**. The scope of the generated data can be narrowed down using the criteria available in the **Filters** tab. All parameters appearing in the tab are described in the article [Beauty Advisor > Orders / list - viewing and handling orders](#).

Section_Beauty_Advisor__Orders__list.png

Section Beauty Advisor > Orders / list

Below you will find a list of parameters included in the generated export file. Each parameter is

described in the article [Beauty Advisor > Orders / list - viewing and handling orders](#).

- **ID**
- **Processed on**
- **Value**
- **First name**
- **Last name**
- **E-mail**
- **Paid?**
- **Package status**
- **Status**

Lite version

BA orders in lite version can be exported in the section **Import/Export> Export / orders**, by selecting the **Export to XLSX** button (2). The scope of the generated data can be narrowed down using the criterion **Processed on**, available in the tab **Filters (1)**.

Section_Import__Export__Export__orders_.png

Section Import / Export> Export / orders

Below you will find a list of parameters included in the generated export file.

- **Shop ID** - POS store number. More details about POS stores are available in the article [Beauty Advisor > POS retail – store management](#).
- **Consultant** - BA consultant e-mail address.
- **Order date** - BA order placement date.
- **Product** - Product SKU.
- **Quantity** - the number of pieces of the product in the order.
- **Catalogue price** - product catalog price. More information on the list price can be found in the article [Beauty Advisor > New order - description of the ordering process](#).
- **Price** - order price, including discounts. You can find more information about discounts and rebates in the article [Beauty Advisor > New order - description of the ordering process](#).
- **Order number** - BA order number in the administrative panel.

Beauty Advisor - message templates

Screenshot_2020-04-29_at_19.1 Getting started

The SMS templates section in the Customers module contains a table with a list of SMS templates that are used on the BA customer data preview screen (for details, see [Beauty Advisor > Contacts - viewing and managing BA clients](#)). The table allows to activate the template, define the type of template, edit, delete and add a new item. The templates are sortable and each item can be managed using the drag and drop method.

SMS_Templates_section_in_the_Beauty_Advisor_module.png

SMS Templates section in the Beauty Advisor module

Table of contents:

- [Viewing and managing templates SMS](#)
- [Adding a new SMS template](#)

Screenshot_2020-04-29_at_19.1 Viewing and managing templates SMS

Below you will find a description of the table and the actions that can be performed in the **SMS templates** tab.

SMS_templates_tab_in_the_Customers__SMS_templates_section.png

SMS templates tab in the Customers > SMS templates section

- **(1) Show X entries** - option to change the number of displayed SMS templates on one page (available range from 10 to 100).
- **(2)** - columns containing information on SMS templates. Each column is sortable:
 - **ID** - unique number of the SMS template in the administration panel. Parameter value generated by the application.
 - **Name** - name of the SMS template, displayed on the button on the BA client preview screen **(6)**. More details is available in the article [Beauty Advisor > Contacts - viewing and managing BA clients](#).

Send_SMS_column_on_the_BA_customer_preview_screen.png

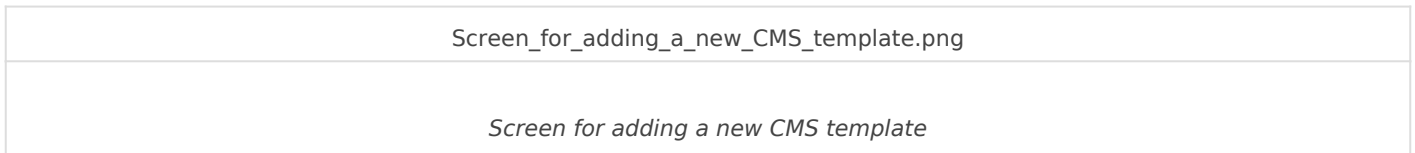
Send SMS column on the BA customer preview screen

- **Content** - text of the SMS that will be sent to the BA client.
 - **Is active?** - the ability to activate and deactivate the SMS template.
 - **Type** - defining the group for which the template will be visible in the column **Send SMS** on the BA client preview screen. For more on BA Consultant Groups, see [Beauty Advisor - getting started](#).
 - **Sort order** - parameter defining the sequence of buttons on the client's preview screen **(6)**. The template with the assigned value 0 will be in the first position.
 - **Creation Time** - CMS template creation date.
 - **Update Time** - data ostatniej edycji szablonu CMS.
 - **Actions**
 - **Edit** - select the button to go to the SMS template editing window.
 - **Delete** - select the button to delete the SMS template.
 - **(3)** - choose the button to go to the window for adding a new CMS template.
 - **(4)** - SMS template search engine (search possible by criteria: **Name, Content, Creation time, Update time**).
 - **(5)** - navigation through the list of BA customers in the administration panel.
-

Screenshot_2020-04-29_at_19.1

Adding a new SMS template

To create a new SMS template, you must complete the fields: **Name, Content, Is active and Type.**



In the **Content** field you can use variables and any placeholders.

info2.svg **Remember**

Placeholder - Attribute, used as a temporary filler or auxiliary text in a text field.
The content in the placeholder can be anything.

Types of variables:

- {%n} - BA clinet name.
- {%ba} - BA consultant name.

Placeholder construction:

- {Placeholder_name}

Example:

```
Mrs. {% n} Thank you for our conversation.  
This is your unique code for free delivery with your next order.  
I wish you pleasant shopping at www.yves-rocher.pl.  
Best regards, {%ba}
```

info2.svg **Remember**

The placeholder can be used in the body of the message, but be sure to remove it before sending it to the client. Otherwise, the application will prevent sending the message with the following warning:

Warning_about_incomplete_template.png

Warning about incomplete template

Beauty Advisor - getting started

The Beauty Advisor functionality allows BA consultants to place an order on behalf of BA customers, and manage orders, customer base, and POS stores.

Communication between a BA consultant and a BA client takes place via three channels: telephone connection, SMS, or messenger (chat and messenger).

info2.svg **Remember**

BA consultant - administrative panel user with “Beauty Advisor” rights. For more information about rights, see [User groups in the administrative panel](#).

info2.svg **Remember**

BA customer - a consumer appearing in the BA customer base located in the module **Beauty Advisor > Contacts**. Contacts are created using BA customer import. For more information, see [Beauty Advisor - mass imports](#).

info2.svg **Remember**

POS stores - retail outlets, created in the administration panel. For more information, see [Beauty Advisor > POS retail - store management](#).

Due to the complexity of the functionality, the individual modules have been described in separate articles:

- [Beauty Advisor > Contacts - viewing and managing BA clients](#)
- [Beauty Advisor > Orders / list - viewing and handling orders](#)
- [Beauty Advisor > Pending orders - viewing orders](#)
- [Beauty Advisor > New order - description of the ordering process](#)
- [Beauty Advisor - description of Recent Activity filter](#)
- [Beauty Advisor > POS retail - store management](#)
- [Beauty Advisor - system settings](#)
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- [Beauty Advisor - exports](#)
- [Beauty Advisor - message templates](#)
- [User groups in the administrative panel](#)

Beauty Advisor - system settings

Screenshot_2020-04-29_at_19.1

Getting started

The general settings of the **Beauty Advisor** module is available in the **Beauty Advisor / Retail Orders (2)** tab, located in the **System > System / settings** section. To go directly to the tab, use the search engine **(1)** and type “beauty”. The next chapter will describe the configurable parameters.

info2.svg **Remember**

For basic information on the Beauty Advisor module, see the [Beauty Advisor - getting started](#).

System_System_Settings_section.png

System > System Settings section

Table of Contents:

- [Description of parameters in the Beauty Advisor / Retail orders tab](#)

Screenshot_2020-04-29_at_19.1

Description of parameters in the Beauty Advisor / Retail orders tab

- **Enabled** - a switch that enables / disables the **Beauty Advisor** functionality.
- **Campaign code** - campaign code assigned to the order placed using BA commerce. The value overrides the default campaign code.
- **Call center campaign code (optional)** - campaign code assigned to the placed order, using BA commerce, by an administrator with Call Center rights. If the field is empty, administrators with the Call Center group will use the campaign code defined in the **Campaign code** field.
- **Default delivery cost** - the default delivery cost for orders carried out through the BA commerce channel. The value can be changed by the BA consultant when placing the order. For more details, see the article [Beauty Advisor > New order - description of the ordering process](#).
- **Auto correct mobile prefix** - phone number auto-correction when importing BA clients and BA consultants.
- **Price discounts (percentage)** - a field with JSON notation where you can modify price discounts granted when placing a BA order. JSON configuration is described in the article [Beauty Advisor > New order - description of the ordering process](#).
- **Price discounts (amount)** - a field with JSON notation where you can modify the amount of discounts granted when placing the BA order. JSON configuration is described in the article [Beauty Advisor > New order - description of the ordering process](#).
- **Gifts** - a field with JSON notation where you can modify the gifts given when placing the BA order. JSON configuration has been described in the article [Beauty Advisor > New order - description of the ordering process](#).
- **Nuxt.js Catalog URL** - path to the product catalog window for BA commerce.
- **Hide phone number column** - a switcher to hide the phone number column in **Beauty Advisor > Contacts**. Changes are visible only to BA consultants with the following permissions: BA, BAC, BAF. The permissions are described in the article [User groups in the administrative panel](#).
- **SMS Template: translate national to latin characters** - a switch that enables / disables the use of Latin characters in the text of the SMS template (section **Customers > SMS templates**).
- **Ignored SKU prefixes** - Option to omit prefixes for orders placed by BA consultants with BAF privileges. The permissions are described in the article [User groups in the administrative panel](#).

- **ETD Discount percentages** - a field where you can modify the ETD discount given when placing a BA order. Recording configuration is described in [Beauty Advisor > New order - description of the ordering process](#).
- **Fixed price discount from catalog prices** - a switch enabling / disabling the option of granting a quota discount on catalog prices when placing an order.
- **Allow non super BA to change price** - a switch enabling / disabling the option of changing price during placing an order for admin panel users with permissions lower than **Super BA**. For more information, see [User groups in the administrative panel](#).
- **Activity segmentation** - a field with JSON record, where you can modify the parameters and values of the recent activity filter. For more information, see [Beauty Advisor - description of last activity filter](#).

User groups in the administrative panel

Screenshot_2020-04-29_at_19.1 Getting started

Each administrator of the administrative panel is assigned to a specific group of users. Each group is characterized by various sets of rights, described in the following chapters of the article.

info2.svg **Remember**

User groups - predefined authorization groups thanks to which panel administrators are able to view the content and perform specific actions. The scope of the content that can be viewed and the scope of possible actions depends on the assigned group.

info2.svg **Remember**

Administrator - a user who has an account set up in the administrative panel.

info2.svg **Remember**

Upon the customer's request, the development team can create completely new groups with a different collection of user rights.

Upon the customer's request, the development team can create completely new groups with a different collection of user rights.

- Administrator
- BAFZBA
- Beauty Advisor
- Beauty Advisor CC
- Beauty Assistant Franchise
- BOK supervisors
- Content editor
- Content manager
- Customer care service
- External call center
- Herbarium editor

- Mc business admin
- POS admin
- Repository manager
- Root
- Super administrator
- Super Beauty Advisor
- Super Beauty Assistant Franchise

Table of contents:

- [User groups from the Beauty Advisor family](#)

Screenshot_2020-04-29_at_19.1

User groups from the Beauty Advisor family

Administrators with an assigned user group from the **Beauty Advisor** family have access to the **Dashboard** and the **Beauty Advisor** module.

Section_Cockpit.png
<i>Section Dashboard</i>

The user groups included in the **Beauty Advisor** family are:

- BAFZBA
- Beauty Advisor
- Beauty Advisor CC
- Beauty Assistant Franchise
- Super Beauty Advisor
- Super Beauty Assistant Franchise

info2.svg **Remember**

All the above groups have access to the same application modules. Only the **Super Beauty Advisor** and **Super Beauty Advisor Franchise** groups have access to the additional **POS retail** section. More information on the **POS retail** section can be found in the article [Beauty Advisor > POS retail - store management](#).

In the **Dashboard**, the administrator can see two tabs: **Planned interviews** and **Past interview**. Details can be found in the article: [Beauty Advisor > Contacts - viewing and managing BA clients](#).

In the **Beauty Advisor** module, the administrator can:

- Browse and manage BA customers in the **Contacts** section. More information about the section available in the article [Beauty Advisor > Contacts - viewing and managing BA clients](#).
- Browse and handle orders in the section **Orders / list**. More information about the section available in the article [Beauty Advisor > Orders / list - viewing and handling orders](#).
- View pending orders in the section Pending orders. For more information on the section, see the article [Beauty Advisor > Pending orders - viewing orders](#).
- Place a new order in the section New order. More information about the section available in the article [Beauty Advisor > New order - description of the ordering process](#).

Beauty Advisor > POS retail – store management

Screenshot_2020-04-29_at_19.1 Getting started

The **POS retail** section in the **Beauty Advisor** module contains a table with all POS stores, susceptible to sorting, with the possibility of editing stores, viewing and adding new stores.

info2.svg **Remember**

POS stores - retail outlets, created in the administration panel. Shops can be added individually (it is possible from the POS retail tab) and imported in groups from external files. For information on importing, see [Beauty Advisor - mass imports](#).

POS_retail_section_in_the_Beauty_Advisor_module.png

POS retail section in the Beauty Advisor module

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- [Viewing and managing POS stores](#)

Screenshot_2020-04-29_at_19.1 Viewing and managing POS stores

Below you will find a description of the table and possible actions in the **Beauty Advisor / POS retail** tab. All the following parameters (except the **ID** parameter) are editable in the administration panel.

Beauty_Advisor__POS_retail_tab_in_the_POS_retail_section.png

Beauty Advisor / POS retail tab in the POS retail section

- **(1) Show X entries** - option to change the number of stores displayed on one page (available range from 10 to 100).
- **(2)** - table with information about stores. You can sort the data by the contents of any column:
 - **ID** - unique store **ID** in the administration panel. The parameter is generated automatically by the application.
 - **POS number** - a unique store number in the administration panel. The number can consist of any characters, of unlimited length. The parameter is editable from the administration panel and overwritten during mass import of POS stores. For more information on importing, see [Beauty Advisor - mass imports](#).
 - **Company** - the name of the company which the store is a part of.
 - **Shop name** - Name of the store. Usually, it also contains store number.
 - **Street** - The street name on which the store is located at.
 - **City** - City name where the store is located at.
 - **Postal code** - Store's postal number.
 - **Phone** - Store's mobile number.
 - **E-mail** - Store's e-mail address.
 - **Actions**
 - **Edit** - select the button to edit the data of the selected store.
 - **Show** - Select to preview information about the selected store.

Window_for_editing_store_data.png

Window for editing store data

- **(3) Search** - store browser (search possible according to the criteria: **City, Street, Store name, Company, POS number**)
- **(4) Add** - select the button to add a new store.

Beauty Advisor > Pending orders

- viewing orders

Screenshot_2020-04-29_at_19.1

Getting started

The **Pending orders** section in the **Beauty Advisor** contains the table (2) with the BA's order pending list. The table is susceptible to sorting, it allows to preview and search for orders. The **Filters** section (1) allows for selecting orders that meet the specified criteria, described in the [Filters](#) chapter.

info2.svg **Remember**

Pending BA Order - BA's placed order, awaiting customer approval.

Once accepted, the orders go to the BA order table in section **Beauty Advisor > Orders /**

List. For more information on order acceptance on the customer's side, see [Beauty Advisor >](#)

[New order - description of the ordering process](#).

Pending_orders_section_in_the_Beauty_Advisor_module.jpg

Pending orders section in the Beauty Advisor module

Table of Contents:

- [Filters](#)
 - [Viewing pending BA orders](#)
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Screenshot_2020-04-29_at_19.1

Filters

The **Filters** tab allows to narrow down the list of pending BA orders, based on the date range during which the orders are waiting for customer approval. Orders that meet the **Creation time** criterion will be displayed in the **Orders / list** tab.

Wizualizacja_sekcji_Filtry_w_module_Beauty_Advisor__Zamo_wienia_oczekuja_ce_w_panelu_administracyjnym.png

Filters tab in section Beauty Advisor> Pending Orders

Screenshot_2020-04-29_at_19.1

Viewing pending BA orders

Below you will find a description of the table with the list of pending BA orders and the possible actions in the **Orders / list** tab.

Orders__list_tab_in_Pending_orders_section.png

Orders / list tab in Pending orders section

- **(1) Show X entries** - option to change the number of pending BA orders on one page (available range from 10 to 100).
- **(2)** - columns containing information about pending BA orders. Each column is sortable:
 - **Creation time** - An exact date and time of the order creation.
 - **First name** - Customer's first name.

- **Last name**- Customer's last name.
- **E-mail**- Customer's e-mail address.
- **Actions**
 - **Show (4)** - select the button to view the details of the pending BA order. The view is only used to preview order data without the possibility of performing any action.

Detailed_order_view.png
<i>Detailed order view</i>

- **(3)** - order search engine (search possible by criteria: **First name, Last name, Email**)
- **(5)** - navigation through the list of orders in the administration panel.

Beauty Advisor > Orders / list - viewing and handling orders

Screenshot_2020-04-29_at_19.1 Getting started

The **Orders / List** section in the Beauty Advisor module contains a table **(4)** with a list of all correctly processed and accepted BA orders (for more information on processing and accepting orders, see [Beauty Advisor > New order - description of the ordering process](#)). The table is susceptible to sorting, it allows you to change order shipment statuses, preview orders, export orders and generate labels. With the help of filters, you can extract orders that meet the criteria specified in the **Filters** section **(3)**, described in the [Filters](#) chapter.

info2.svg **Remember**

BA Order - An order placed by BA consultants in the Beauty Advisor module that has been accepted by a BA customer. For more information on accepting BA orders, see [Beauty Advisor > New order - description of the ordering process](#). For information on BA consultants and BA clients, see [Beauty Advisor - getting started](#).

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- [Generating a CSV file with orders and printing labels for the courier](#)
 - [Filters](#)
 - [Viewing and handling BA orders](#)
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Screenshot_2020-04-29_at_19.1

Generating a CSV file with orders and printing labels for the courier

In the **Orders / list** section, you can perform 2 mass operations:

Orders__list_section_in_Beauty_Advisor_module.jpg

Orders / list section in Beauty Advisor module

1. Generate a list of orders for the courier in CSV format by selecting the **Generate CSV file for courier** button **(1)**. After selecting the button, the application generates a csv file and takes you to the operation summary view, where you can download the file to a local disk, using the **Download file** button.

A_message_with_a_summary_of_the_operation.png

A message with a summary of the operation

info2.svg **Remember**

You can generate a list of all orders for the courier only for orders with the status "**Ready to be sent**".

caution.svg **Note**

After generating the file, orders with the status "**Ready to be sent**" will change their status to "**Sent**".

2. Generate an order label using the **Print all** button **(2)**. The application generates a PDF file and displays the generated labels, the options are: downloading the file to a local disk or printing directly.

Generated_label.png

Generated label

info2.svg **Remember**

You can generate a list of all orders only for orders with the status “**Waiting for preparation**”.

caution.svg **Note**

After generating the file, orders with the status “**Waiting for preparation**” will change their status to “**Under preparation**”.

Screenshot_2020-04-29_at_19.1

Filters

The **Filters** tab allows you to select orders in terms of the criteria described below. Orders that meet the selected criteria will be displayed in the **Orders / list** tab.

Screenshot_2020-12-17_at_19.47.38.png

Filters tab in section Beauty Advisor > Orders / list

- **Processed date** - the date range during which the order was registered in the application.
- **Order value** - the scope of the order value.
- **Status** - order status (available: "New", "Processing", "Sent", "Delivered", "Returned", "Cancelled", "Delivery failure", "Shipping in progress"). System parameters are verified and changed automatically by the application. For more information on order statuses, see [Beauty Advisor > Orders / list - viewing and handling orders](#).
- **Package status** - shipment status in the **Beauty Advisor** module. The BA consultant can manually change each status.

- **Waiting for preparation** - status assigned automatically by the application, after placing the order, only when the COD (cash on delivery) form of payment has been selected. If another form of payment is chosen, the shipment will be given the status "**Waiting for payment**". The shipment status automatically changes to "**Under preparation**" when the order label is generated.
 - **Waiting for payment** - status assigned automatically by the application, after placing the order, only when the online payment method has been selected. When the order is paid, the shipment status automatically changes to "**Under preparation**".
 - **Under preparation** - Status assigned manually by the BA employee. This status causes a window to show up with a field where the employee has to enter the approximate package weight.
 - **Ready to be sent** - a status that can only be set manually.
 - **Sent** - status assigned automatically by the application after generating the CSV file for the courier.
 - **Delivery method** - Shows available delivery methods. filter value depends on the settings in the administration panel.
 - **Payment method** - Shows available payment methods. filter value depends on the settings in the administration panel.
 - **Deferred payment status** - the available statuses: "*paid*", "*overdue*", "*pending*".
 - **Check status** - order verification status (available "*new*", "*successfully checked internally*", "*internal check failed*", "*successfully exported*", "*export failed*", "*successfully processed*"). System parameters, are verified and changed automatically by the application. For more information on order statuses, see [Beauty Advisor > Orders / list - viewing and handling orders](#).
 - **Paid?** - option of selecting payment status (COD / DP, paid, preconfirmed *payment*, *waiting for payment*, *anceled*). System parameters, are verified and changed automatically by the application.
 - **Customer ID** - unique customer ID. For more information, see [Beauty Advisor > Contacts - viewing and managing BA clients](#).
 - **Only with vouchers** - check the checkbox to display orders where the FIDEN2 voucher has been used.
-

Screenshot_2020-04-29_at_19.1

Viewing and handling BA orders

Below you will find a description of the table with a list of BA orders and the possible actions in the **Orders / list** tab.

Orders__list_tab_in_section_Beauty_Advisor__Orders__list.png

Orders / list tab in section Beauty Advisor> Orders / list

- **(1) Show X entries** - option to change the number of BA orders on one page (available range from 10 to 100).
- **(2)** - columns containing information on BA contracts. Each column is sortable:
 - **ID** - the unique identifier of the BA order in the administration panel.
 - **Processed on** - date and time of BA order processing
 - **Value** - Order value.
 - **First name** - Customer's first name.
 - **Last name**- Customer's last name.
 - **Email** - Customer's e-mail address.
 - **Paid?** - Payment status. If the selected delivery was Cash on Delivery it will show COD.
 - **Package status** - Shipment status. Pressing the print label button **(5)** will change this status to “*Under preparation*”. The BA consultant must manually change the status to “*Ready to be sent*” in order to bring up a popup **(8)** where he will enter the weight of the package. This action will enable pressing the **Generate CSV file for courier** button and the shipment status will change from “*Ready to be sent*” to “Sent”.

Pop-up_with_the_option_to_enter_the_weight_of_the_package.png

Pop-up with the option to enter the weight of the package

- **Status** - Current order status.
- **Actions**
 - **(5)** - select the button to generate a label for a given order. The action changes the status to “*Under preparation*” from all other shipment statuses.
 - **Show (6)** - select the button to go to the order details. In the order details view, you can change the shipment status **(8)**, as in the example below.

Order_details_in_Beauty_Advisor__Orders__list.png

Order details in Beauty Advisor> Orders / list

- **(3)** - order search engine (search possible by criteria: **First name, Last name, Email**)
- **(7)** - navigation through the BA orders list in the administration panel.

Beauty Advisor > New order - description of the ordering process

Screenshot_2020-04-29_at_19.1 Getting started

The **New Order** section of the **Beauty Advisor** module allows BA consultants to submit an order on behalf of BA clients. BA consultants have control over the granted discounts and the selection of gifts added to the order. BA consultants can also modify the customer's data, as well as choose the method of confirming the purchase. The ordering process consists of several steps. Each process involves different actions, described in the following chapters of the article.

info2.svg **Remember**

Below you will find URL links to articles that describe:

- [What is a BA order](#)
- [Who is a BA customer and a BA consultant](#)

New_Order_section_in_Beauty_Advisor_module.png

New Order section in Beauty Advisor module

Table of Contents:

- ["Add product" tab](#)
 - [Product selection by name or SKU code](#)
 - [Selecting a product from the catalog](#)
- ["Order" tab](#)

- [Tab "+ Add gift"](#)
- ["FIDEN2" tab](#)
- ["Delivery methods" tab](#)
- ["Address data" tab](#)
- [Configuration of parameters in the "Order" tab](#)
- [Configuration of parameters in the "+ Add gift" tab](#)

Screenshot_2020-04-29_at_19.1

"Add product" tab

The tab allows you to add a product to an order using two methods: [Product selection by name or SKU code](#) or [Selecting product from catalog](#). Before adding a product to the order, you can select the number of items **(3)** and change the price (catalog or promotional) **(4)**. The product is added to the order by clicking the **+ Add to order** button **(5)**.

Product selection by name or SKU code

To add a product to your order, enter the product's SKU or name in the **SKU** field **(2)**. The **Paste SKU** button **(2)** allows you to paste the SKU code from the clipboard. The search engine automatically suggests products **(6)** whose name or SKU code contains the entered characters. The search engine displays only products marked as active in the catalog.

Add_Product_tab_in_Beauty_Advisor__New_Order.png

Add Product tab in Beauty Advisor> New Order

The **Promotion price** field **(4)** contains the current promotional price of the product. If the product does not have a promotional price, the catalog price is displayed. The **Promotion Price field (4)** allows you to change the price before adding a product to the order. After selecting the **+ Add to order** button **(5)**, the product will appear in the ["Order" tab](#).

info2.svg **Remember**

Catalog price - basic price, not including the promotional price of the product.

Add_a_product_in_the_Add_Product_tab_in_Beauty_Advisor__New_Order.png

Add a product in the Add Product tab in Beauty Advisor> New Order

Selecting a product from the catalog

The second method of adding a product to the order is to select the button

Open a product catalog session (1). You will be taken to a new view where you can view the entire catalog of the store's products, taking into account all categories and subcategories **(8)**, using the product finder **(7)** (you can search for the product by the name or SKU code). The top menu with categories **(8)** and the list of products are fully configurable from the administration panel. For more information, see the articles:

info2.svg **Remember**

The list of products and the top menu with categories correspond 100% to the content available on the store's website.

An_open_session_of_the_product_catalog_in_the_Beauty_Advisor_module.png

An open session of the product catalog in the Beauty Advisor module

(9) - buttons used to navigate through the open session of the product catalog.

(10) Close - a button used to close the session and return to the section **New order** in the **Beauty Advisor** module.

To add a product to the order, select the **Add to order** button next to each product. After selecting the button, the following message will be displayed in the upper right corner of the browser window and the product will appear in the ["Order" tab](#).

A_message_confirming_that_the_product_has_been_added_to_the_order_from_the_open_session_of_the_product_catalog.png

A message confirming that the product has been added to the order from the open session of the product catalog

Screenshot_2020-04-29_at_19.1

“Order” tab

The tab contains products added to the order. You can change the catalog price for products, give discounts, and set the cost of delivery. Below you will find a description of the possible actions in the **Orders** tab.

Order_tab_in_section_Beauty_Advisor__New_order.png

Order tab in section Beauty Advisor> New order

- **(1)** - changing the catalog price of the product.
- **(2)** - changing the number of items of the product.
- **(3)** - unchecking the product. The unchecked product will not be included in the order.
- **(4) x** -removing a product from the **Order** tab.
- **(5) FIDEN2 discounts** - granting a FIDEN2 discount. The discount is calculated on the list price of the product.
- **(6) Discount** - giving a percentage discount. The discount is calculated on the list price of the product. The configuration of button values is described in the chapter Configuration of parameters appearing in the “**Orders**” tab.
- **(7) Price** - possibility to set the price of the product. The operation will overwrite the value of field **(1)**.
- **(8) Fixed price discount from catalog prices** - the possibility of granting an amount rebate on product list price.
- **(9) ETD Discount (End of ticket discount)** - additional discount at the end of the order, independent of the discounts granted earlier in the promotional module. The discount is given to all added products in the **Order** tab.
- **(10)** - a field in which you can set the cost of delivery, included in the total value of the order.

info2.svg **Remember**

Discounts may not be combined.

info2.svg **Remember**

Only the price of gifts can be “0”. If the product is not a gift, an attempt to submit an order will end with an error.

info2.svg **Remember**

A product with several color variants has an additional section **Available colors** in the **Order** tab, where you can choose one of the available colors (example below).

The_ability_to_choose_the_color_of_the_product_in_the_Order_tab.png

The ability to choose the color of the product in the Order tab

Screenshot_2020-04-29_at_19.1

Tab “+ Add gift”

The tab allows to add a gift to the order using the visible buttons. Each button represents one gift. After clicking a chosen button, a present will appear in the tab [“Order” tab](#). The headers and gifts assigned to the given buttons are configurable from the level of the administration panel (the configuration method is described in detail in the chapter [Configuration of parameters in the “+Add gift” tab](#)).

Add_gift_tab_in_section_Beauty_Advisor__New_order.png

Add gift tab in section Beauty Advisor> New order

Screenshot_2020-04-29_at_19.1

"FIDEN2" tab

The tab contains the customer's FIDEN2 points balance, it allows to award of additional points for the order (points will be added to the pool of FIDEN2 points). The tab also contains the customer's loyalty card number (mother card number) and the points that the customer will receive for the placed order.

FIDEN2_tab_in_section_Beauty_Advisor_New_Order.png

FIDEN2 tab in section Beauty Advisor> New Order

The data of the FIDEN2 tab will be filled in automatically upon choosing the **Place order** button in the section **Beauty Advisor> Contacts** (the process is described in the article [Beauty Advisor > Contacts - viewing and managing BA clients](#)). After choosing this button, you will be taken to the **FIDEN2** tab with the automatically filled data.

Screenshot_2020-04-29_at_19.1

"Delivery methods" tab

The delivery methods tab allows Beauty Advisor employees to select the desired delivery method. This tab is only visible if at least two delivery methods are assigned to the selected BA altshop. **At least 1 delivery method must be assigned to the altshop**, or there will be a notification, that the order cannot be created, as no delivery method is selected.

POWERPNT_ARukdtmN4s.png

Delivery method tab visualization

The delivery method tab contains available delivery methods with their logo, name, and regular delivery fee for a selected range of cart value. This fee doesn't apply additional costs for the customer but is only informational for the employees on what fees are normally used. The fee may change depending on the configuration of the delivery method - for example, in this case, **Balik do Ruky** has a delivery fee of **119Kc** between **0** and **899** cart value, and between **900** and **9999999** it has a delivery fee of **0kc**.

If the selected method is a pickup point delivery, then in the [customer address tab](#) there will be an additional field, where the employee is able to select the point.

info2.svg **Remember**

You can find information about configuring the delivery methods in the selected altshops in the [Delivery costs / list - browsing and managing delivery costs](#) article.

Screenshot_2020-04-29_at_19.1

“Address data” tab

In the address data tab, you can enter the personal data of customers **(1)**. If the selected delivery method uses pick-up points you will see a Delivery point field, which allows you to select such delivery point. By pressing the Select button you will open the delivery point map. You can also indicate the method of payment for the order **(2)**. After selecting the payment method, the BA customer will receive the option to confirm the purchase via SMS or e-mail (according to the method chosen by the BA consultant) and the order placed will be visible in the section:

- **Beauty Advisor> Pending orders** - if the payment method with confirmation has been selected
- **Beauty Advisor> Orders / list** - if the payment method has been selected without confirmation

Payments with the required BA customer confirmation include the following methods:

- Order with payment on delivery with confirmation
- Order with payment on delivery and SMS confirmation

info2.svg **Remember**

The options **Place order with COD and confirmation** and **Place order with on-line payment** will only be available if the **E-mail** field is filled in. Remember that both COD and PayU payment options need to be assigned to the altshop used in the Beauty Advisor module in order for them to work.

POWERPNT_LgXPHvudzB.png

Address data tab in section Beauty Advisor> New order

POWERPNT_hftspFbbdq.png

Visualization of the delivery point map

info2.svg **Remember**

You can find more information about the delivery point widget in the [Delivery point widget](#) article.

Below you will find an example of an SMS with the option to confirm the order and an e-mail confirming the order with the option to display the order status.

Widok_wiadomos_ci_SMS_z_moz_liwos_cia__potwierdzenia_zamo_wienia.png

SMS message with the option to confirm the order

__Widok_e-maila_potwierdzaja_cego_z_oz_one_zamo_wienie_.png

E-mail confirming the submitted order

After clicking on the link **Pokaż status zamówienia** (show order status), the BA customer will be taken to the page with the order summary and the possibility of payment. For this purpose, use the **Do płatności** (to the payment) button.

Screenshot_2020-10-28_at_18.55.30.png

Order summary page

info2.svg **Remember**

The address data will be filled in automatically when you choose the button **Place order** in the section **Beauty Advisor> Contacts** in the tab **Beauty Advisor / Contacts**(the process is described in the article [Beauty Advisor > Contacts - viewing and managing BA clients](#)). After selecting this button, you will be taken to the Address data tab with automatically

filled data.

info2.svg **Remember**

The Consumer data tab will be displayed above the [“Add product” tab](#), with a preview of the consumer’s data and the possibility of going to the section **View contact**, in the **Beauty Advisor module**, using the **Show customer** button (example below).

The_Consumer_Details_tab_in_section_Beauty_Advisor__New_Order.jpg

The Consumer Details tab in section Beauty Advisor> New Order

Screenshot_2020-04-29_at_19.1

Configuration of parameters in the “Order” tab

In the system settings of the administration panel, you can modify the values assigned to the following parameters in the **Order** tab:

- [Discount \(1\)](#)
- [Price\(2\)](#)
- [ETD discount\(3\)](#)
- [Delivery cost\(4\)](#)

Orders_tab_in_section_Beauty_Advisor__New_order.png

Orders tab in section Beauty Advisor> New order

To make changes to the settings, go to section **System / Settings** in the **System** module, and use the search engine **(5)** to enter the phrase “beauty”.

After searching for the relevant phrase, the **Beauty Advisor / Retail Orders** tab **(6)** will be displayed.

The_Beauty_Advisor__Retail_Orders_Activity_tab_in_the_section_System__Settings_of_the_module_Beauty_Advisor.png

The Beauty Advisor / Retail Orders Activity tab in the section System / Settings of the module Beauty Advisor

Discount

The **Price discounts (percentages)** field (1) contains JSON that defines the color of the buttons and the values assigned to them, which are visible in the **Order** tab. Below you will find an explanation of the record.

_Price_discounts_percentage_field_in_the_Beauty_Advisor__Retail_Orders_tab_in_the_System__Settings_section.png

Price discounts (percentage) field in the Beauty Advisor / Retail Orders tab in the System / Settings section

```
{"color": "#8b9620", "discounts": ["5", "10", "13", "15", "20", "23", "25", "26", "27", "30", "32", "33", "40", "45", "50", "52"]}
```

The fragment above contains an object with 2 attributes:

- **"color"** - button color, the value of which may be:
 - color name (example: **"color": "green"**)
 - hexadecimal notation (example: **"color": "#8b9620"**)
- **"discounts"** - a rebate, the value of which may be:
 - integer (example: **"discounts": "5"**)
 - decimal number (example: **"discounts": "1.5"**)

Example

```
{"color": "#8b9620", "discounts": ["5", "10"]}
```

The above notation will look as follows in the **Order** tab:

discount.png

Buttons assigned to the Discount parameter in the Order tab

Price

The **Price discounts (amount)** field (1) contains the same JSON, with the same structure as in the [Discount](#) field.

The_Price_discounts__amount__field_in_the_Beauty_Advisor__Retail_Orders_tab_in_the_System__Settings_section.png

The Price discounts (amount) field in the Beauty Advisor / Retail Orders tab in the System / Settings section

ETD discount

The ETD discount values can be defined in the **ETD Discount percentages** field. They can be integers or decimals. An empty field will hide the discount in the **Order** tab.

Zniz_ka_ETD.png

The ETD Discount percentages field in the Beauty Advisor / Retail Orders tab in the System / Settings section

Example

[0.5, 1, 5, 10, 15, 20]

The above notation will look as follows in the **Order** tab:

Buttons_assigned_to_the_ETD_discount_parameter_in_the_Order_tab.png

Buttons assigned to the ETD discount parameter in the Order tab

Delivery cost

You can change the delivery cost in the Default delivery cost field **(1)**.

Default_delivery_cost_field_in_the_Beauty_Advisor__Retail_Orders_tab_in_the_System__settings_section.png

Default delivery cost field in the Beauty Advisor / Retail Orders tab in the System / settings section

Screenshot_2020-04-29_at_19.1 Configuration of parameters in the “+ Add gift” tab

In the system settings of the administration panel, you can edit the name of the group **(1)** and the gifts assigned to it **(2)** in the tab + **Add gift**.

Tab__Add_gift_in_section_Beauty_Advisor__New_order.png

Tab + Add gift in section Beauty Advisor > New order

To introduce changes, go to the **Beauty Advisor / Retail Orders** tab in the system settings and scroll to the **Gifts** field. Below you will find an explanation of the notation.

The_Gifts_field_in_the_Beauty_Advisor__Retail_Orders_tab_in_the_System__Settings_section.png

The Gifts field in the Beauty Advisor / Retail Orders tab in the System / Settings section

```
{"group_name":"I Próg > 59 zł Sklepy Własne ","color":"#8b9620","gifts":[  
{ "sku":"P94359","name":"Pur Bleuet dwufazowy płyn do demakijażu oczu z wyciągiem z bławatka BIC
```

The fragment above contains an object with 3 main attributes:

- **"group_name"** - the value of which may be:
 - string (example: **"group_name": "I Próg > 59 zł Sklepy Własne"**)
- **"color"** - the color of which may be:
 - color name (example: **"color": "green"**)
 - hexadecimal notation (example: **"color": "#8b9620"**)
- **"gifts"** - the value of which is other objects:
 - **"sku"** - a unique product number, the value of which is:
 - SKU of the product. The given number must match the number existing in the product database, otherwise the gift will not be added to the order (example: **"sku": "P94359"**)
 - **"name"** - name of the product, the value of which may be:
 - string (example: **"name": "Pur Bleu et dwufazowy płyn do demakijażu oczu z wyciągiem z bławatka BIO 200ml"**)
 - **"price"** - the price of the product, the value of which may be:
 - integer (example: **"price": "5"**)
 - decimal number (example: **"price": "0.01"**)

Example

```
[{"group_name": "II PRÓG > 149 zł", "color": "#b2c11d", "gifts":
[{"sku": "P76148", "name": "Woda toaletowa Hello Printemps", "price": "0.01"},
{"sku": "P71426", "name": "Przeciwzmarszczkowy krem regenerujący pod oczy", "price": "0.01"},
{"sku": "PI2171", "name": "Zestaw do makijażu oczu", "price": "0.01"},
{"sku": "2TREE", "name": "Zasadz 2 drzewa", "price": "0.01"}]}]
```

The above record will look as follows in the **Order** tab:

Wizualizacja_nazwy_grupy_i_przypisanych_do_niej_prezento_w_w_zak_adce___Dodaj_prezent_.png

The name of the group and the gifts assigned to it in the + Add gift tab

Beauty Advisor - description of last activity filter

Screenshot_2020-04-29_at_19.1 Getting started

The **last activity filter (1)** allows to select BA customers based on the selected date range of the last purchase. Customers are marked with different colors - depending on the time that has passed since their last purchase. These colors and the date range assigned to them are configurable in the system settings. For more information, see chapter [Configuration of colors and date range of the “Recent Activity” filter](#). Clients meeting the criteria specified in the **Filters** tab will be displayed in the **Beauty Advisor / Contacts** tab **(4)**. The number of days since the last purchase is shown in the **Last activity** column **(2)**. The **Show data** button **(3)** shows additional information on the last purchases made by the BA customer. Details are available in the chapter [Filter - Last activity and customer data preview](#).

info2.svg **Remember**

For more information on BA clients and the Beauty Advisor module, see [Beauty Advisor - getting started](#).

info2.svg **Remember**

Access to the configuration is granted to users of the administration panel, with a higher level of rights (min. “Administrator”). For more information on permissions, see [User groups in the administrative panel](#).

Contacts_section_in_the_Beauty_Advisor_module.png

Contacts section in the Beauty Advisor module

Table of Contents:

- [Filter - Last activity and customer data preview](#)
- [Configuration of colors and date range of the “Recent Activity” filter](#)
- [Example of use](#)

Screenshot_2020-04-29_at_19.1

Filter - Last activity and customer data preview

The **Customer data** screen shows the dates of the last purchases made by a BA customer in each of the three sales channels: BA commerce **(1)**, in stationery shops **(2)**, and e-commerce **(3)**. Position **Last activity** item **(4)**, indicates the number of days that have elapsed since the last order of a BA customer in any of the sales channels listed above.

Window_with_BA_client_data_and_information_about_his_Last_activity.png

Window with BA client data and information about his Last activity

- **Last BA commerce purchase date (1)** - date of the last purchase made by BA commerce. Data on the purchase are generated automatically by the application.
 - **Last retail purchase date (2)** - date of the last purchase made at a Yves Rocher store using the customer’s loyalty card. Purchase data is collected from a CSV file daily imported, from the JANTAR database. The value can also be updated during mass import of clients (both in regular and lite versions).
 - **Last e-commerce purchase date (3)** - date of last purchase from Yves Rocher online store. The purchase data is generated automatically by the application.
-

Screenshot_2020-04-29_at_19.1

Configuration of colors and date range of the “Recent Activity” filter

To edit the colors and date ranges assigned to them, go to the **System / settings** section in the **System** module, and use the search engine **(1)** to enter the phrase “beauty”. After searching for the relevant phrase, the **Beauty Advisor / Retail Orders** tab **(2)** will be displayed.

Widok_zak_adki_Beauty_Advisor__Retail_Orders_Activity_w_sekcji_System__ustawienia_w_module_Beauty_Advisor.png

Beauty Advisor / Retail Orders Activity tab in the System / Settings section of the Beauty Advisor module

The **Activity segmentation** parameter contains a JSON record that defines the colors and date ranges that appear in the **Last activity** filter. Below you will find an explanation of the record.

Screenshot_2020-10-14_at_12.20.19.png

Activity segmentation parameter settings in the Beauty Advisor / Retail Orders tab in the System / Settings section

- **"from"** - pa parameter that allows to define the number assigned to the filter **Last activity** from which the defined color will be visible. The field must contain a valid integer.
 - **"to"** - a parameter that allows to define the number assigned to the filter **Lasy activity** to which the defined color will be visible. The field must contain an integer or null (0) if the range is to be open on one side.
 - **"color"** - parameter that allows to define the label color assigned to a given range of numbers. The value can be a color name (example: "red") or hexadecimal notation (for example: #ff000).
-

Screenshot_2020-04-29_at_19.1

Example of use

To better understand the record, see the example below:

```
{
  "from": 8,
  "to": 14,
  "color": "orange"
}
```

The above entry will show an orange label **(1)**:

- in the filter **Last activity**
- next to customers whose Recent Activity is between 8 and 14 days (example below **(2)**):

Beauty_Advisor__Contacts_tab_in_Beauty_Advisor__Contacts.png

Beauty Advisor / Contacts tab in Beauty Advisor > Contacts

Below you will find the final JSON code that would work as follows:

- the red label will be assigned to consumers with activity in the range of 0-7 days
- the orange label will be assigned to consumers with an activity in the range of 8-14 days
- the label with the color # 00ff00 will be assigned to consumers with an activity ranging from 15 days to infinity

```
[
  {
    "from": 0,
    "to": 7,
    "color": "red"
  },
  {
    "from": 8,
    "to": 14,
    "color": "orange"
  },
  {
    "from": 15,
    "to": null,
    "color": "#00ff00"
  }
]
```

Beauty Advisor - mass imports

Screenshot_2020-04-29_at_19.1

Getting started

Using the administration panel, you can perform:

- mass update of BA clients
- mass import of new BA clients
- mass import of new BA consultants
- mass update of BA consultants
- mass customer anonymization

You can perform all types of imports in the **Import / Export > Import** section. Dedicated descriptions are included in the following chapters of the article.

info2.svg **Remember**

Mass import – an operation that allows the to collective add new data to the administration panel as well as modify and delete the existing data. The operation is initiated by loading one import file or a set of appropriately constructed import files in the indicated location in the administration panel.

info2.svg **Remember**

For basic information on BA commerce, see the article [Beauty Advisor - getting started](#).

POWERPNT_zgpJM48J3S.png

Import / Export > Import section

Table of Contents:

- [Description of “Import” tab](#)
- [Mass update of BA clients](#)
 - [Full import version](#)
 - [Lite version](#)

- [Import of new BA clients](#)
 - [Mass update of BA consultants](#)
 - [Import of new BA consultants](#)
 - [Import of BA customer anonymization](#)
-

Screenshot_2020-04-29_at_19.1

Description of “Import” tab

Below you will find a description of the possible actions in the Import tab.

Import_tab_in_the_Import__Export__Import_section.png

Import tab in the Import / Export > Import section

- **File** – option to choose an import file from the local disk. The file format depends on the type of import performed.
- **Type** – specification of the type of import performed.
- **Options** – option to perform a test import. The operation will not end with data import, but you will receive a report that allows to verify whether the import result is correct.
- **Import file** – click the button to start mass import. Selecting this button and confirming the form will start data processing.

All types of imports described in the current article can be performed by following these steps:

1. Select the import file from the local disk.
 2. Indicate the type of import.
 3. Press the **Import file** button.
-

Screenshot_2020-04-29_at_19.1

Mass update of BA clients

Due to the current limitations in the import of Excel files, you can perform two types of import (full version import and lite import). Each type is described in the following section. The current import is limited to approximately 100,000 rows. This limit will be extended with further updates.

info2.svg **Remember**

Import is possible only for users of the administration panel assigned to one of the following groups:

- Administrator
- Super Administrator
- Root

More information on the administration panel user groups is available in the article [User groups in the administrative panel](#)

Full import version

The full import version (import type: "Customer contact database for Consultant update") contains all the updateable data about the BA customer. Below you will find descriptions of the columns in the import file.

Widok_zawartos_ci_pliku_importowego__Customer_contact_database_for_Consultant_update_.jpg

Import file content (file type) : „Customer contact database for Consultant update“

info2.svg **Remember**

The fields marked with an asterisk (*) are mandatory fields. If the field remains empty, the import of the given record will return an error.

info2.svg **Remember**

Empty values in the optional fields will delete the currently existing data in the administration panel, leaving the field empty.

info2.svg **Remember**

If the system detects a row with a new BA client in the imported file during import, the import of the given record will return an error.

All the parameters described below modify the data in the tab **Customer Data**, located in the customer data preview. For details about the view, see [Beauty Advisor > Contacts - viewing and managing BA clients](#).

- **LAST_CUSTOMER_CODE** - customer's FIDEN2 card number.
- **FIRST_NAME *** - BA customer first name.
- **NAME *** - BA customer's last name.
- **PHONE *** - BA customer's phone number with country code (configuration is described in the article [Beauty Advisor - system settings](#)).
- **ACTUAL_SHOP *** - POS store number assigned to the BA customer. For more information about stores, see the article [Beauty Advisor > POS retail - store management](#).
- **RANKING *** - A range of BA customers ranking (1-999999). You can find a description of this parameter in [Beauty Advisor > Contacts - viewing and managing BA clients](#).
- **CITY** - city.
- **POSTAL_CODE** - customer's postal code.
- **STREET1** - street.
- **HOUSE_NUMBER** - house number.
- **BOX_NUMBER** - premises number.
- **EMAIL** - BA customer email address.
- **DATE_BIRTH** - date of birth of BA customer.
- **LPD_BA** - date of the last purchase made through BA channel.
- **LPD_ECOMMERCE** - date of the last purchase from Yves Rocher online store.
- **LPD_RETAIL** - date of the last purchase made at Yves Rocher store using the customer's loyalty card.
- **LA** - the value of the **Last activity** filter. For details on the filter, see [Beauty Advisor - getting started](#).
- **ID** - unique BA customer identification number. Application generated parameter.

All the parameters below contain information on customer orders made in stationary stores. Values are created and overwritten only during mass import of BA customers, which represents information stored in the **Retail shopping stats** tab (details about the tab are available in the article [Beauty Advisor > Contacts - viewing and managing BA clients](#)). All fields are optional.

- **TOP1_TO_PRODUCT**
- **TOP1_TO_PRODUCT_LABEL**
- **TOP1_TO_LPD_TXT**
- **TOP1_TO_PRODUCT_PRICE**

- **TOP1_TO_TO**
- **TOP1_TO_QT**

 **Note**

The value of the "**ID**" column cannot be modified. "**ID**" is a key parameter to identify the client.

Based on this parameter, the application performs appropriate operations on data.

Specification of the import file

- file format: .xlsx
- file name: any name

Lite version

Import in lite version (import type: "Customer contact database for Consultant update (lite version) ") allows for update of four BA client data. Below you will find descriptions of the columns in the import file.

Widok_zawartos_ci_pliku_importowego__Customer_contact_database_for_Consultant_update__lite_version__.png

Import file content (file type): "Customer contact database for Consultant update (lite version)"

 **Remember**

The fields marked with an asterisk (*) are mandatory fields. If the field remains empty, the import of the given record will return an error.

 **Remember**

Empty values in the optional fields will delete the currently existing data in the administration panel, leaving the field empty.

 **Remember**

If the system detects a row with a new BA client in the imported file during import, the import of the given record will return an error.

- **ACTUAL_SHOP *** - POS store number assigned to the BA customer. For more information about stores, see the article [Beauty Advisor > POS retail - store management](#).
- **RANKING *** - BA customer ranking range (1-999999). For a description of the parameter, see [Beauty Advisor > Contacts - viewing and managing BA clients](#).
- **LPD_RETAIL** - date of the last purchase made at Yves Rocher store using the customer's loyalty card.
- **ID *** - unique BA customer identification number. Application generated parameter.

 **Note**

The value of “**ID**” column cannot be modified. “**ID**” is a key parameter to identify the client. Based on this parameter, the application performs appropriate operations on data.

Specification of the import file

- file format: .xlsx
- file name: any name

Screenshot_2020-04-29_at_19.1

Import of new BA clients

With the type of import: “Customer contact database for Consultants - import XLSX” you can import new BA clients that do not exist in the admin panel.

 **Remember**

Import is possible only for users of the administration panel assigned to one of the following groups:

- Administrator
- Super Administrator
- Root

More information on the administration panel user groups is available in the article [User](#)

[groups in the administrative panel.](#)

info2.svg **Remember**

If, during import, the system detects a row in the imported file containing the BA client that exists in the administration panel, then the import of a given record will return an error.

The content of the imported file is identical to the mass update of BA clients in the w [Full import version](#).

caution.svg **Note**

The import file cannot contain a column named **ID**, because it is a parameter generated automatically by the application when performing import.

Specification of the import file

- file format: .xlsx
- file name: any name

Screenshot_2020-04-29_at_19.1

Mass update of BA consultants

Import type: “*POS Users*” allows modification of data of BA consultants, who are in the administration panel. Below you will find descriptions of the columns in the import file.

info2.svg **Remember**

Import is possible only for users of the administration panel assigned to one of the following groups:

- Super Administrator
- Root

More information on the administration panel user group is available in the article [User](#)

[groups in the administrative panel](#)

info2.svg **Remember**

If, during import, the system detects a row in the imported file containing a new BA consultant, then the import of a given record will return an error.

Widok_zawartos_ci_pliku_importowego__typ_pliku__POS_Users.jpg

Import file content (file type): "POS Users"

- **id** - A unique customer identification number generated by the application.
- **first_name** - BA consultant first name.
- **last_name** - BA consultant last name.
- **email** - BA consultant e-mail address.
- **mobile** - BA consultant phone number.
- **active** - a field defining the activity of the BA consultant's account in the administration panel. The value "1" means an active account, and the value "0" - inactive.
- **last_login_date** - the last date and time when the BA consultant logged in to the administration panel. The parameter value is generated by the application. Import does not overwrite the values in the administration panel.
- **group_name** - group to which the BA consultant is assigned in the administration panel. More information on the administration panel user groups is available in the article [User groups in the administrative panel](#)
- **pos_reports_number** - POS store number assigned to the BA consultant, used for reporting purposes.
- **ba_pos_number** - POS number assigned to the BA consultant in the administration panel.
- **default_altshop_id** - unique identification number of the default altshop, assigned in the administration panel to the BA consultant. For more information on altshop, see [Alt shops - Introduction](#)

caution.svg **Note**

The value of "ID" column cannot be modified. "ID" is a key parameter to identify the client. Based on this parameter, the application performs appropriate operations on data.

Specification of the import file

- file format: .xlsx

- file name: any name

Screenshot_2020-04-29_at_19.1

Import of new BA consultants

Type of import: “Admin user import XLSX” allows to import of new BA consultants. The description of the imported data contained in the file is presented below.

info2.svg **Remember**

Import is possible only for users of the administrator panel who have been assigned to the group: “Root”. More information on the administration panel user groups is available in the article [User groups in the administrative panel](#)

Widok_zawartos_ci_pliku_importowego__Consultant_import__.png

Import file content (file type): "Admin user import XLSX"

- **NAME** - BA consultant first name.
- **SURNAME** - BA consultant last name.
- **SHOP_ID** - shop to which the consultant is assigned.
- **EMAIL_ADRES** - BA consultant email.
- **MOBILE_NUMBER** - BA consultant telephone number with country code telephone.
- **LANGUAGE** - language in which the BA consultant will use the administration panel.
- **BA_GROUP** - group to which the consultant is assigned. Type of import: “Admin user import XLSX” allows to assign only one of the following groups:
 - Beauty Advisor
 - Beauty Advisor CC
 - Beauty Assistant Franchise
 - Super Beauty Advisor
 - Super Beauty Assistant Franchise

The administration panel user groups are described in the article [User groups in the administrative panel](#).

- **DEFAULT_ALTSHOP** - default altshop assigned to the customer. More information on altshops is available in the article [Alt shops - Introduction](#)

info2.svg **Remember**

If, during import, the system detects a row in the imported file containing a BA consultant that exists in the administration panel, the import of a given record will return an error.

info2.svg **Remember**

Import type: "Admin user import XLSX" only allows you to import employees who are assigned to one of the following groups:

- Administrator
- Super administrator
- Root

Specification of the import file

- file format: .xlsx
- file name: any name

Screenshot_2020-04-29_at_19.1

Import of BA customer anonymization

Import type "Anonymization of the customer contact database for Consultants" allows to import of customer internal IDs located in the .xlsx file and anonymizes all of them in the BA platform. This import triggers the BA customer anonymization, which also can be done manually in the:

BA customer profile > GDPR > Anonymize account (forget customer)

The reason for the anonymization in the ***BA > Anonymized contacts*** after the import is set to "**Anonymization import**".

info2.svg **Remember**

Import type: "Anonymization of the customer contact database for Consultants" can be used by users who are assigned to one of the following groups:

- MC business admin
- Administrator
- Super Administrator
- Root

The import is not limited to the users assigned POS, so users having one of the above-mentioned groups will be able to anonymize all BA users without any restrictions.

POWERPNT_cQf9DchS5k.png

Visualization of the example BA customer anonymization xlsx file

As the import searches for the **ID** column, any .xlsx file can be imported, and the import mechanism will ignore all columns that are not labeled as **ID** and import ID's from the **ID** column.

caution.svg **Note**

The anonymization process cannot be undone after the initiation. Please make sure that the imported file has the correct customers.

Specification of the import file

- file format:
 - .xlsx
 - .csv, delimiter: ; and enclosure: " , encoding: UTF-8.
- file name: any name

Beauty Advisor > Contacts - viewing and managing BA clients

Screenshot_2020-04-29_at_19.1 Getting started

The **Contacts** section in the **Beauty Advisor** module contains a table (2) with the list of BA clients imported to the administration panel. The table is sortable, it allows for the placement of an order for a given BA customer, displaying their data and searching for the target contact using the search engine.

Filters (1) will help you to extract contacts that meet the set criteria. It is described in the [Filters](#) chapter.

info2.svg **Remember**

Below are URL links to articles where you can find the following information:

- [Who is a BA customer](#)
- [Beauty Advisor > New order - description of the ordering process](#)
- [How to import BA clients into the admin panel](#)

Contacts_section_in_the_Beauty_Advisor_module_in_administration_panel.png

Contacts section in the Beauty Advisor module

Table of Contents:

- [Filters](#)
 - [Viewing and managing BA clients](#)
 - [Preview of BA customer data - description of possible actions](#)
-

Screenshot_2020-04-29_at_19.1

Filters

The **Filters** tab allows for the selection of BA clients based on the criteria described below. BA clients meeting the selected criteria will be displayed in the **Beauty Advisor / Contacts** tab.

Filters_tab_in_Beauty_Advisor__Contacts.png

Filters tab in Beauty Advisor > Contacts

- **Status** - BA client status. There are 4 types of status:
 - **New** - status assigned during mass import of BA customer base.
 - **Unanswered** - status assigned manually in the administration panel when the customer did not answer the phone.
 - **Answered without ordering** - status assigned manually in the administration panel, when the customer answered the phone but the order was not placed on the customer's account.
 - **Converted** - status assigned to the client automatically by the application after placing the order in the **Beauty Advisor** module.
- **Ranking** - BA customer ranking range (1-999999). The parameter is editable only when importing BA clients. The parameter value is set by Yves Rocher employees.
- **It has a birthday on** - the range of birthdays of BA customers. The parameter is editable only when importing BA clients.
- **Last retail purchase date** - the range of dates for the BA customer's last purchase in-store. Purchase data is collected from a daily imported CSV file, from the JANTAR database. The value can also be updated during mass import of clients (both in regular and lite versions).
- **No BA commerce after** - the day from which no BA commerce orders have been recorded at the customer's premises. The parameter is automatically generated by the application. Mass import of BA clients does not affect the parameter value.
- **Card number** - customer's FIDEN2 card number.
- **Last activity** - a complex filter that allows to narrow down the list of BA clients in terms of their recent activity. For information on the operation and configuration of the filter, see [Beauty Advisor - description of last activity filter](#).

Screenshot_2020-04-29_at_19.1

Viewing and managing BA clients

Below you will find a description of the table with the list of BA clients and possible actions in the **Beauty Advisor / Contacts** tab.

Beauty_Advisor__Contacts_tab_in_Beauty_Advisor__Contacts_in_administration_panel.png

Beauty Advisor / Contacts tab in Beauty Advisor > Contacts

- **(1) Show X entries** - option to change the number of BA customers on one page (available range from 10 to 100).
- **(2)** - columns containing information about BA customers. Each column is sortable:
 - **ID** - the unique identifier of the BA customer in the administration panel.
 - **Mobile** - Customer's mobile number.
 - **First name** - Customer's first name.
 - **Last name** - Customer's last name.
 - **City** - City to where the client will have their BA order delivered.
 - **Birthday** - Customer's date of birth.
 - **Last BA commerce purchase date** - date of the last BA commerce purchase.
 - **Last activity** - days since the last purchase made by a BA customer in any sales channel (physical store, e-commerce, Beauty Advisor).
 - **Status** - customer status ("new", "unanswered", "answered without ordering", "converted").
 - **Ranking** - customer ranking range (1-999999).
 - **Last note** - last note left by the BA consultant when making the purchase.
 - **Actions**
 - **Place order (3)** - select the button to place a new order on the customer's account. For more information on placing a new order, see [Beauty Advisor > New order - description of the ordering process](#).
 - **Show data (5)** - select the button to display the BA customer data. More information on viewing the BA client, see [Preview of BA customer data - description of possible actions](#).

- **(4)** - BA customer search engine (search possible by criteria: "Mobile", "First name", "Last name", "City").
- **(6)** - navigation through the list of BA customers in the administration panel.

Screenshot_2020-04-29_at_19.1

Preview of BA customer data - description of possible actions

The View contact section allows to preview the BA customer data placed in the **Customer** tab **(4)**, move to the BA orders list using the **Orders** button **(3)**, and switch between the [Personal data](#) **(1)** and [Retail shopping stats](#) **(2)** views.

Sekcja_View_contact_w_module_Beauty_Advisor.png

Sekcja View contact w module Beauty Advisor

Personal data

The view contains the **Customer** tab consisting of 5 fields, described below.

The field **Consumer data** contains data about the customer and allows to change the status of the BA customer.

The_Consumer_data_column_in_the_Customer_tab.png

The Consumer data column in the Customer tab

- **Customer code** - a non-unique BA customer code consisting of only digits, of unlimited length. It is created and overwritten at the time of mass import (optional field).
- **Card number** - customer's FIDEN2 card number.

info2.svg **Remember**

Information about fields: Last BA commerce purchase, Last stationary purchase, Last e-shop purchase and Recent activity is available in the article [Beauty Advisor - description of last activity filter](#).

The **Address data** section contains the correspondence data of the BA customer and allows transfer to the order placement window - use the **Place order** button **(6)**. The consumer's details will be automatically filled in. For more information on submitting an order [Beauty Advisor > New order - description of the ordering process](#).

Address_data_column_in_the_Customer_tab.png

Address data column in the Customer tab

The **Save the note from the conversation** column allows for making a note of the conversation with BA customers and to plan contact with them.

Save_note_from_conversation_column_in_the_Customer_tab.png

Save note from the conversation column in the Customer tab

The scheduled contact list **(7)** will be visible in the BA Consultant's Cockpit. Next to it there is a list of planned contacts from the past **(8)**. The tables contain the first and last name of the BA customer together with the telephone number (if assigned to the customer), the date of the scheduled contact, and the ability to view BA customer data using the **Show contact** button. You can access the list of all BA clients using the **Show all contacts** button.

Screenshot_2020-12-16_at_15.34.53.png

List of planned contacts and past interviews in the BA Consultant's Cockpit

For a chronological list of BA consultant notes, see Recent Notes. The prepared notes and applied cannot be edited.

Recent_notes_column_in_the_Customer_tab.png

Last notes column in the Customer tab

The **Send SMS** column enables sending an SMS to the telephone number assigned to the BA customer. You can enter any text message or use predefined templates available in the **SMS Templates** section (more information on creating and editing templates is available in the article [Beauty Advisor - message templates](#)).

Send_SMS_column_in_the_Customer_tab_.png

Recent notes column in the Customer tab

Retail shopping stats

The view contains information on customer orders made in stationary stores. Values are only created and overwritten during mass import of BA clients (for more information on mass imports, see [Beauty Advisor - mass imports](#)).

Retail_shopping_stats_screen_in_the_Customer_section.png

Retail shopping stats screen in the Customer section