## SUGGESTED STEPS FOR INVITE FOLLOW UP



Login to your dashboard and from the tool bar on the left, select "Invite".

ID					
P					
	30 Days	Current Month	Prior Month	Year To Dat	
9lii	Customer Lo	cations			
٩	QUOTING	0	SHIPPIN	SHIPPING	

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## 2 Resend Past Invitations

Access the Invited Customers list - a lifetime archive of sent invitations. You can see recipients, when an invite was sent or if it was accepted. If accepted, customer accepted the invitation. If not. You will see two icons. The Envelope, which means that you can resend the invitation immediately simply by clicking on the icon.

## Expired Invitations

The triangle means an invitation has expired – more than likely you've sent an invitation more than 3 times in 1 week. To send a new invitation, go to the "Invite New Customer" section, reenter the customer's email address, first and last name, and a personal message from you.

Invite New Customer			
Email Address *	First Name *	Last Name	
Personal message	A		
Invited Customers			SEND INVITATION
Email	Q, ↑ Name	Q, 1 Last Invite Sent	1
mlbrubaker@yopmail.com	Melissa Brubaker	03/15/2021	invitation was accepted on 03/15/2021
kylemlakar@yopmail.com	Kyle Mlakar	02/23/2021	33
bill.jims@platics.com	Bill Jane	02/15/2021	13
billplastic@billsplastic.com	Jane smith	02/15/2021	12
allehapipp-1567@yopmail.com	Level II Support Invite Test	11/24/2020	33
ceffizerez-6625@yopmail.com	Level II Support Test 1	11/24/2020	<b>A</b>
ivyxifeqy-3055@yopmail.com	Trevor Testing	11/19/2020	invitation was accepted on 11/19/2020
mkoch@cames.com	Mark Koch	11/17/2020	18
Shipping1@yopmail.com	Yurika Jamison	11/16/2020	invitation was accepted on 11/16/2020