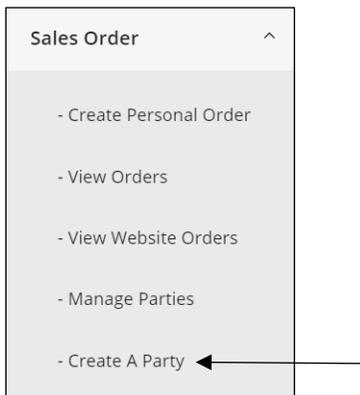# How to Enter a Party

Setting Up the Party

1. From the main menu, click **Create a Party** or from the left navigation bar, select **Sales Order** and then click **Create a Party**.

2. Click on **Create a Party**.

3. Under **New Party**, click **Select Party Host**.

4. Search for a previous host by typing a name and clicking the magnifying glass or select **Create New Host** if you have never had a party with this host.
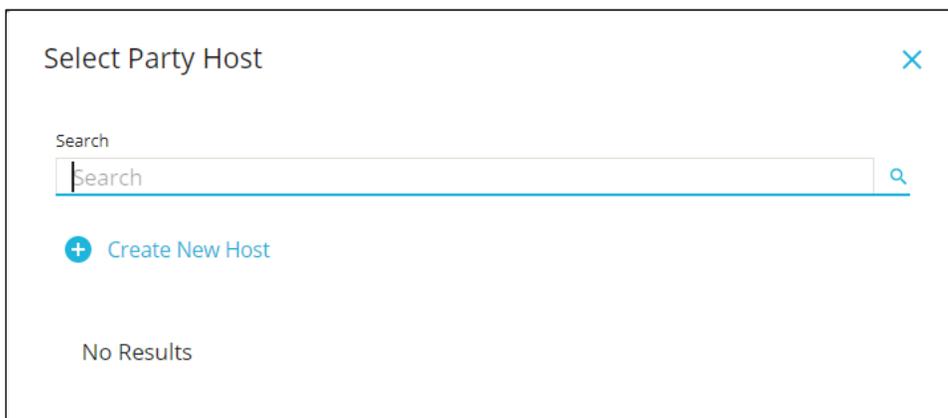
5. If you are creating a new host, enter all required information:
   - First Name
   - Last Name
   - Email
   - Phone
   - Country (defaults to the correct country)
   - Address Line 1
   - Address Line 2 (optional)
   - City
   - State
   - Postal Code

6. Click **Create New Host**.

7. You may receive an **Address Validation** pop-up. Verify the correct address and click **Proceed**.

8. Click **Select Event Type**.

9. Click **Party.** (Party is the only event type currently.)

10. On the **New Party** area, enter a **Party Name.**

11. Schedule the party by selecting the date on the calendar. Then select the **Time** and **Duration**.
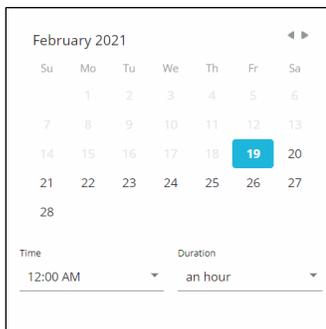
12. You may edit the Party **Shipping Address** or the **Party Address** by clicking **Change Address**.

    You may now directly ship items to guests instead of only to the party host.

13. By default, a link to your party will appear on your personal website. If you do not want that link to appear, deselect the **Show party link on my website**.

14. Select the **Event Source** (or leave the default).*

  - Connect
  - Fair
  - Street Action
  - Social Media
  - Hostess
  - Other

15. Add details in the **Comments for party** box. (These comments will only be seen by the Consultant, not the party guests.)

Comments for party:

16. Click **Save**.

Your party has now been setup. It has a party number, and it now appears in **Sales>Manage Parties**.

Managing Party Invitations

1. Click on the **Manage Invitations** tab at the top of the page.

2. Click on **Add Guest**.

3. Search for past guests or **Create New Guest**.

4. To create a new guest, type their **Name**, **Email**, and **Phone Number**.

5. Add another guest or click **Save**.

   The guests will be added to the party.

6. Click **Send All Pending Invites** or click on each one you want to send.

7. Click on the template.

8. Type text into the **Body**.

9. Click **Send**. The status changes to **Invited**.

10. You may view the **Invitation Stats**.

11. You may **Send All Reminders**.

12. You may click **Copy Party Link** to use in an email or text. If your customers want to pay with their own credit card, send them this link.

The invitees will have the option to continue to shop for the party.

13. Click **Yes** to continue.

Entering Party Orders

1. Click the **Party Orders** tab at the top of the page.

Note: Before your guests can order, you have to **Complete Their Profile**.

2. Completing a profile requires an address, so if you do not want to add an address for that person, just click **Add Guest**.

For direct ship orders, click on the pencil next to the address in the top left corner. An edit shipping address appears. Update the address and click save. This will enable the order to be direct shipped to the customer when the party closes. Direct ship rates apply.

Card View is the default or you may select **List View**.

3. Click **View Cart**. Type in an item number if you know it or type the name. You may also click **Browse Products**.

There is now an option to send a link to a guest so that he or she may pay for the order. You may copy the link to send in a text or email it.
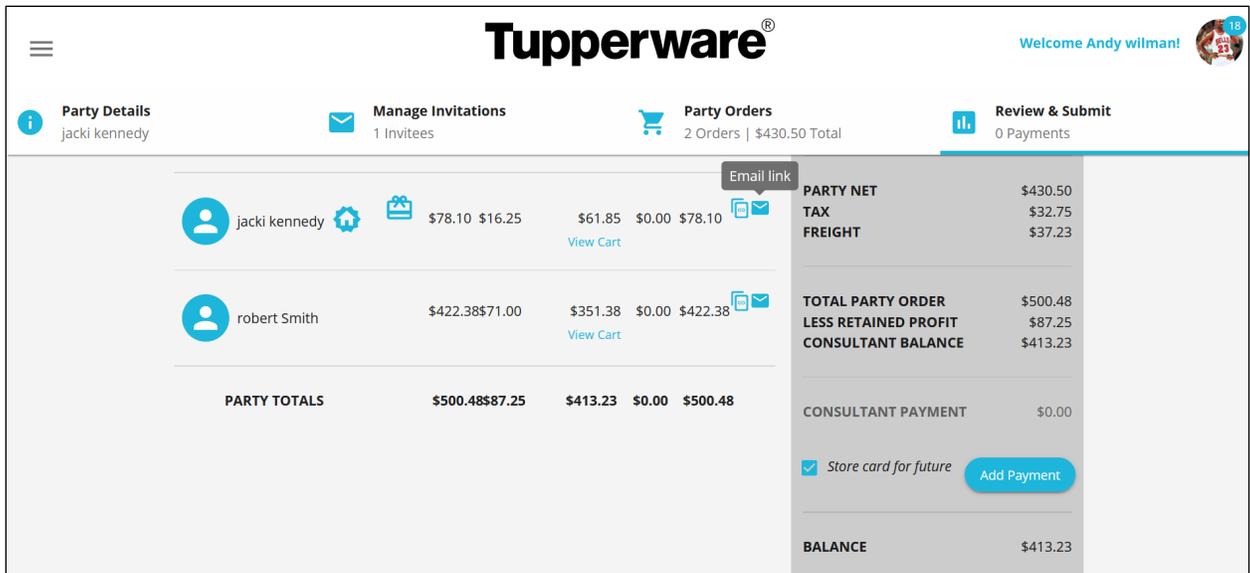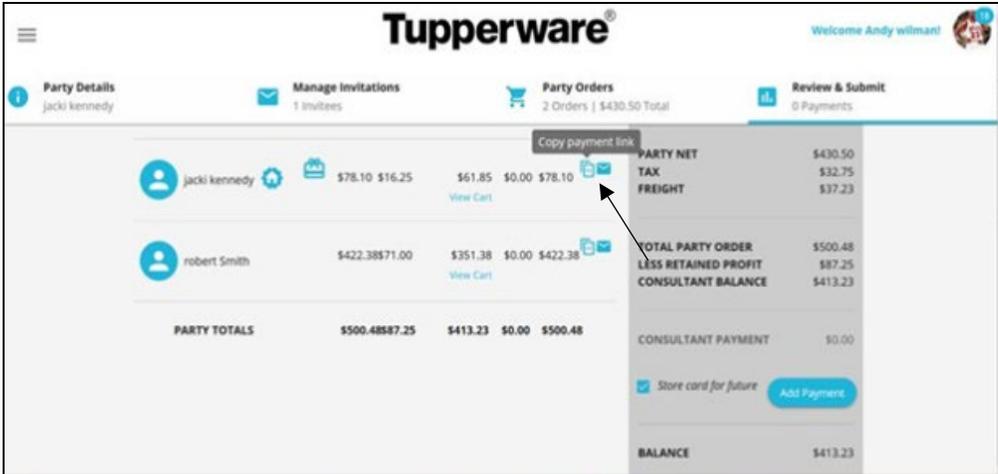
4. Click **Checkout**.

5. If a customer accepts the offer to date a party, click on **Add Bookings** on the customer's card. You will be directed to the **Book A Party** pop-up screen.

Book A Party

Party Type *

Party

Party Name *

Party Name

Date *

Time *

12:00 AM

Duration *

an hour

Show party link on my website

Cancel   Add Booking

6. Add a **Party Name**.

7. Select a **Date**.

8. Select the **Time** and **Duration**.

9. Select **Show party link on my website** to show it on your site.

10. Click **Add Bookings**. This will create a party that you can view in your **Manage Parties** area. If a consultant wants to place an order, it works the same as a guest. You can click **Add Bookings** for that person to add their own party.

11. Click outside the pop-up box to continue.

Entering a Consultant Order

When consultants order items, the process is the same as when ordering from a party.

Entering the Host Order

1. Click on **View Cart for the Host**. (The Host's card has a home icon on it.)

2. When hosts order items, the process is the same as for a customer.

3. Hosts may also order from their rewards. The **Rewards Summary** is on the right side of the screen.

4. The **Rewards Summary** shows what the host qualifies for.

   The Host Credit is based on the party's retail volume.

5. Redeem your host gifts/rewards by clicking on **Shop Now** next to each item.

   You will be able to see what is **Earned**, **Used**, and **Remaining**.

6. Click **Checkout**.

7. Click outside the box when you are done.

Reviewing and Submitting a Party

1. Click **Review & Submit** at the top of the page.

   You will see a list of the orders that have been placed.

2. Click **Copy Payment Link** to send the link so the host can make the payment.

   After the host has paid for the host balance, the balance will become 0.

3. To pay the Consultant Balance, click **Add Payment** to select the **Tupp Card** or **Add New Card**.

4. Click **Continue**.

5. Add **Billing Information** and click **Finish**.

6. To save the card for future reference, ensure that **Store card for future** is selected with the checkbox by the card number.

7. Click **Submit Party** to process the payment.

8. You will be directed to the **Party Summary** page which you can print for your records or refer to it later in your portal. You may check back later to check the status of your order.