

# Setting up Your SendOutCards Business for Success

- Watch a recorded “System Coaching” webinar**  
[Click here for a system coaching list](#)
  
- Edit Personal Information**  
Check your personal information in your Card Manger Main Menu under "Edit Personal Information" for errors and make sure you have check marks in the boxes next to your email reminders, so you can receive upline emails and other reminders.  
[Change Your Contact Information Video Webinar](#) - length 0:58  
[Video Printable Version](#)
  
- Activate your Business Office**  
Click the link that says "Business Office" on your Card Manger Main Menu. When this page loads, you will need to click the button that says “I Agree.” This is where you go to check your orders, customers, and your downline (geneology).  
[Business Office Overview Video Webinar](#) - length 6:39
  
- Add Money to your Expense Account**  
This is used for postage and gift checks and gift cards.  
[Purchase Products Video Webinar](#) - length 2:28  
[Video Printable Version](#)
  
- Add Groups**  
Simply go to “Manage Groups” in your Card Manger Main Menu. Group starter ideas to include: Friends, Family, Neighbors, Church, Holiday Card List, Business Clients, New Clients, Past Clients, Business Owners, My Networking Group, My Contact Info My SendOutCards Sponsor/Coach Etc.  
[Create a Group Video Webinar](#) - length 1:45  
[Video Printable Version](#)  
Friendly Reminder: The groups above are just starters, you can customize as you go or as needed.

- Add Yourself and your first 10 people in your Contact Manager**

From your Card Manger Main Menu, click on "Add New Contact." Fill out the form completely. Add all personal information including Primary Contact, Family Members, Birthday, Anniversary, etc. Add each contact to a group by checking the box of the group they belong too. Click on the "Save" button on the bottom left corner of page.

[Add a Contact Video Webinar](#) - length 3:50  
[Video Printable Version](#)

Friendly Reminder: Throughout the "Add New Contact" form page, capitalization and punctuation will be very important since some of this information will appear on the outside of an envelope when mailed (i.e. First Name, Last Name, Street Address, City, State).
  
- Set up your Automatic Gift Account**

From the "Main Menu" click on "Management Tools" then click on "Automatic Gift Account". Click and check the small square box on the upper left above user name to "enable" gift account.

[Create an Automatic Gift Account Video Webinar](#) - length 5:38  
[Video Printable Version](#)

Suggestions for your set-up:  
Use the same for both username and password and write it down. Put 6 points and \$1.00 in the expense account. (You can now walk someone through sending 2 cards with or without pictures.) Put 20 for the amount of gift accounts that can log in with this password. After 20 people have logged in you have to go back in to click on the "enable" box again. Keep the number of days at 15 days. Be sure to click save changes.
  
- Set up your [Gift Account Banner](#)** to help you get started building your SendOutCards business. This is a great tool to use when you're showing SendOutCards to the people you know. From the "Main Menu" click on "Management Tools" then click "Gift Account Banner Options" select a Template, upload your portrait and click "Save Settings".
  
- Send one unexpected greeting card right now**, to the very first person that you are prompted to. This is an extremely good habit to get into each and every day!  
[Send a Card Video Webinar](#) - length 4:23  
[Video Printable Version](#)
  
- Complete your SendOutCards Handwriting Font Form**

It is extremely important to get this form completed as soon as possible, since many new SendOutCards users are very excited to see their handwriting come to life in greeting cards.

[Click Here For PDF File and Instructions On How To Do This](#)

**Quick Start Bonus Step**

Make a list of 10 people to contact immediately about SendOutCards. If these people are not already in your SOC Contact Manager, add them now and contact them. Find out when they can be on the internet so you can give them a gift. (A gift account on SOC). Your upline coach may be used to help you make your first few gift account presentations.