



Isagenix Business Platform FAQs & Tips

GENERAL FAQs

Q. How do I log in if I already have an Isagenix Business account?

- A. If you have an Isagenix Business account, you can log into your ABO, click on the **Resources** tab, and then select Isagenix Business inside the menu. This will take you to your Isagenix Business Dashboard on the desktop. You can also download the Isagenix Business app from your app store on your mobile phone. We recommend you update your phone's operating system before downloading the application to your phone. Once the application is downloaded, log in using your Isagenix Corporate username and password.

If Isagenix Business does not appear under the Resources of your ABO or you can't log into the Isagenix Business application with your Isagenix corporate credentials, please contact Isagenix customer service by calling 1-300-651-979 for Australia or 0800-451-291 for New Zealand.

Q. Can I import contacts?

- A. Yes! There are couple of ways you can import your contacts to the desktop version. The two basic ways to import contacts use either an Excel or CSV file. Information on how to do this is shown below, or you can access instructions by going to your Isagenix Business desktop version, hovering your mouse over the **Contacts** tab and select **Import Contacts** from the drop down menu.

IMPORT CONTACTS - UPLOAD YOUR CSV FILE

The **email or SMS phone number** and first name fields are required. All other fields are optional and do not necessarily need to be included in your file. The **SMS phone field**, if included, must start with the country code. If you already have a contact with a matching email, then that row in the .CSV file will be used to update the data of the old contact. If no matching email is found, then a new contact will be created.

- Log into your builder/dashboard
- Hover your mouse over the **Contacts** tab and select **Import Contacts** from the drop down list.
- Scroll down the page to the section labeled Upload Your CSV File
- Click on the tab Choose File. Select the file from your computer.

Note: We recommend editing your CSV file before uploading into your contacts list. This ensures that contacts without a first name or email address can be removed, and titles the columns appropriately before importing the contacts.

Allowed field names:

"last_name"	"address2"
"first_name"	"city"
"email"	"state"
"phone"	"zip"
"phone2"	"country"
"sms_phone"	"notes"
"address"	"folders"

IMPORT CONTACTS – CUT AND PASTE EXCEL CONTACTS

- Log into your builder/dashboard
- Hover your mouse over the **Contacts** tab and select **Import Contacts** from the drop down list
- Scroll down the page to the section labeled **Cut and Paste Excel Contacts**
- The **email or SMS phone number** and **first name** fields are required. All other fields are optional and do not necessarily need to be included in your file.
- Open the Excel file you want to copy the contacts from
- Highlight the contacts you would like to add to your system, including any detailed info (address, phone, email, etc.).
- Select **Edit** from the menu in the Excel file and then **Copy**
- Go back to the **Import Contacts** page
- To the right of **Cut and Paste Excel Contacts**, right click in the box and select **Paste**

Note: We recommend editing your Excel file before copying and pasting the content.

Allowed field names:

“last_name”	“address2”
“first_name”	“city”
“email”	“state”
“phone”	“zip”
“phone2”	“country”
“sms_phone”	“notes”
“address”	“folders”

Q. Can I make my own auto-responders and drip emails?

- A.** As a Pro member, yes! You can create both drip emails and auto-responders by going to the IsaTools desktop and clicking on the **Prospecting** tab in the menu. Select **Coaching Emails & Drips**, then click the **Add Campaign** button to make your own emails.

Q. How do I log into the Isagenix Business app?

- A.** Please use your Isagenix corporate account credentials that you would use to log into your ABO. For assistance, please contact Isagenix customer service: AU 1-300-651-979 or NZ 0800-451-291.

Q. Will contacts that I sync in the app from my phone show up in my desktop Contact Manager?

- A.** Any contacts that you add to your desktop’s Contact Manager will be added when you sync contacts in the Isagenix Business app. Any contacts from your device that you sync into the app will only be added to the desktop Contact Manager once you have shared something with that specific contact.

Q. Do the contacts I add to my Isagenix Business desktop Contact Manager get added to the Contact section of the app?

- A.** Yes! All contacts that are in the desktop Contact Manager will be added to the Contacts section of the app when you sync. If you have added any contacts to the Contact Manager of the desktop since your last contact sync in the app, you will need to do a **pull-to-refresh** on the Contacts section of the app to see those updates.

Q. How do I change my username or password?

- A.** Passwords can be changed via your ABO. Username changes will need to go through Isagenix Corporate. They can be reached by calling 1-300-651-979 for Australia or 0800-451-291 for New Zealand.

Q. How do I know when to contact Isagenix Corporate or IsaTools for support questions?

- A.** Isagenix Corporate will be able to assist you with questions about billing, username and password updates, questions about your ABO, and any Isagenix specific items of business. Isagenix Business will handle any technical support for questions regarding the Isagenix Business System, whether the app or the desktop. They can be reached by calling 1-800-794-8158 or emailing CustomerServiceANZ@IsagenixCorp.com.

Q. Can I edit a Coaching Campaign Drip and how?

- A. This is a Pro feature can be edited on the desktop. This can be done by going to the **Prospecting tab – Coaching Emails & Drips**. Once there, you can copy an existing campaign by selecting the copy icon on the right. This will allow you to make edits to a copied version of the drip so you can access both the original and your custom drip. Changes made will also be added into the app for easy sharing!

Q. How do I set up my notifications?

- A. **Desktop:** Go to your builder
Hover your mouse over the **My Profile** tab and select **My Profile** from the drop down menu
Click on the tab labeled **Notifications found on the left**

On this page you will be able to enter up to **five** email addresses and one cellphone number that you would like to receive notifications for. Once you have entered your email/cell phone information you will want to select the notifications that you would like to receive. When the circles are **blue**, this will mean they have been selected for you to receive notifications.

Click **Save Notifications**.

Isagenix Business App: Log into your application

This will allow you to receive an email notification letting you know your contact has viewed the PDF, video, or article you shared with them through the SMS or email share methods.

1. First, click on the **Settings** option found in the menu bar at the bottom of the app screen.
2. Second, select the **Notifications** option.
3. Then select the **Email** option, turn it on, and then enter up to 5 emails in the spaces found below. Use the slider to turn the notifications on and then click the **check mark** or **Done** button to save.
4. You can then follow the same steps to add one mobile phone number to receive SMS notifications by going to **SMS** in the **Notifications** section in **Settings**.
5. On the notifications screen, select the **Test Notifications** option to ensure that you will receive the notifications after your prospects view the content you sent them.

Hint: When entering the email addresses do not use auto complete as this will add a space after the completed email address, which will affect the notifications being sent to you.

Hint: Some mobile providers will not allow you to receive text notifications since they don't come from a standard mobile number. One way to work around this is to add the email associated with your mobile number. To find out what that email address is, you can text a message to one of your personal email addresses. Once you've received that email, look at the email address in the 'From' section and that will be the email you will add under email notifications. You can then test the notifications to ensure you will receive the notifications.

Q. What is a Lead Capture Page?

- A. A lead capture page is a page that will pop up for a prospect to fill out with some information such as Name, Number, Email, ect. before they can view the content you have shared with them. This can be managed and turned off and on in both the app and desktop. In the app you would go to **Setting – My Information – Lead Capture**. For the desktop, you would click on the **My Profile tab** then go to **Lead Capture** in the options on the left menu of the screen. Here you will able to customize your lead capture page and turn it off and on.

Q. How do I get access to Hurdlr?

- A. This feature is offered in the Pro membership of Isagenix Business. You can access this feature as a Pro member by going to the Isagenix Business desktop version. Hover over the **My Profile** tab and select **Products and Services**. Next, click **Buy Now** for the Hurdlr product.

You will then be able to view a link to Hurdlr in both the app (under the Business tab) and in the desktop (under the **My Business** tab). Please note that Hurdlr is only for United States and Canadian Users.

Q. How do the Email Server Settings work?

- A. In the email server settings, you now have the option to use our system instead of your own email address to send out information to your contacts. If a recipient responds to an email you have sent using our system, the response will go to the email address you have set up in the **My Information** section on the **My Profile** page.

If you select the **Enable Advanced Settings** under the **Email Server Settings** tab of **My Profile** and you want to set up your own email address, “it’s possible that your email provider won’t allow the communication from our system to get to your email without adjusting your account’s security settings. It will then be recommended to use our system in place of your own email address.

If you would like to proceed with using your own email address, you will need to get in contact with your email provider so they can assist you with the set up.

**** We appreciate you as an Isagenix Business member, and appreciate any feedback! Please send any feed back for Isagenix Business at: CustomerServiceANZ@IsagenixCorp.com.**