

## Steps

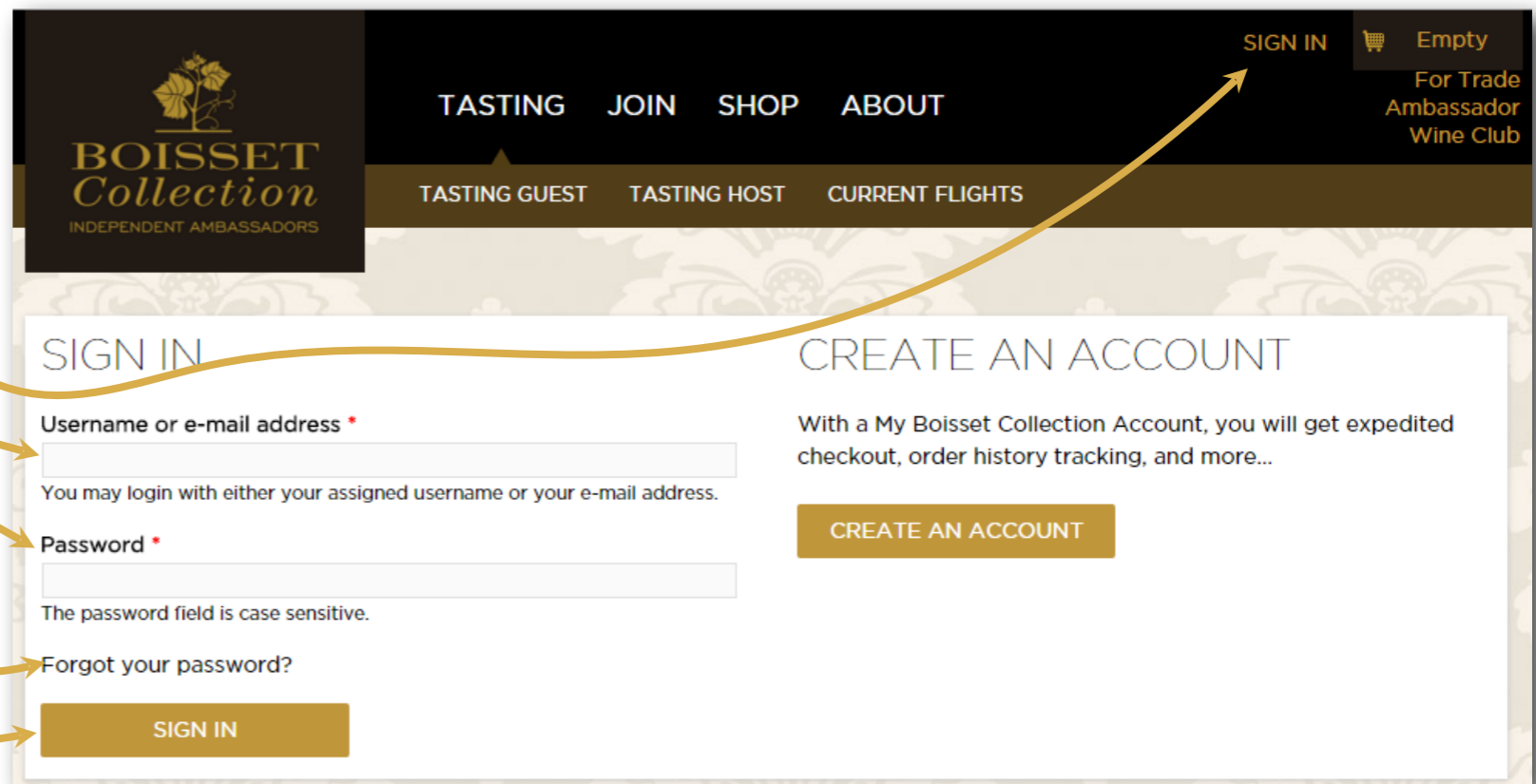
1. If you are not already signed into your customer's account, start by clicking on the "Sign In" button at the top of any page.

2. Then you will just need to fill in their e-mail address and password on file.

- If they have forgotten their password, simply click on the "Forgot your password" link.

3. Then click on the "Sign In" button.


- You can click 'Create an Account' if your customer does not have an account yet on the website.



**BOISSET**  
*Collection*  
INDEPENDENT AMBASSADORS

TASTING JOIN SHOP ABOUT

TASTING GUEST TASTING HOST CURRENT FLIGHTS

SIGN IN  Empty  
For Trade Ambassador Wine Club

### SIGN IN

Username or e-mail address \*

You may login with either your assigned username or your e-mail address.

Password \*

The password field is case sensitive.

[Forgot your password?](#)

SIGN IN

### CREATE AN ACCOUNT

With a My Boisset Collection Account, you will get expedited checkout, order history tracking, and more...

CREATE AN ACCOUNT

### Steps

- This is another way to access your customer's account directly from your back office.
1. From your back office, click on the 'My Customers' widget to go to your Customer Report.
  2. From the Customer Report, click 'Place Order' next to the customer whose account you want to access. You do not have to place an order, this will simply log you into their account.
  3. You will see a notification on the next page that says "You are now logged in as (Customer Name)".
- The rest of the steps in this tutorial are the same whether you signed in to your customer's account from the Sign In page or accessed it from your back office.



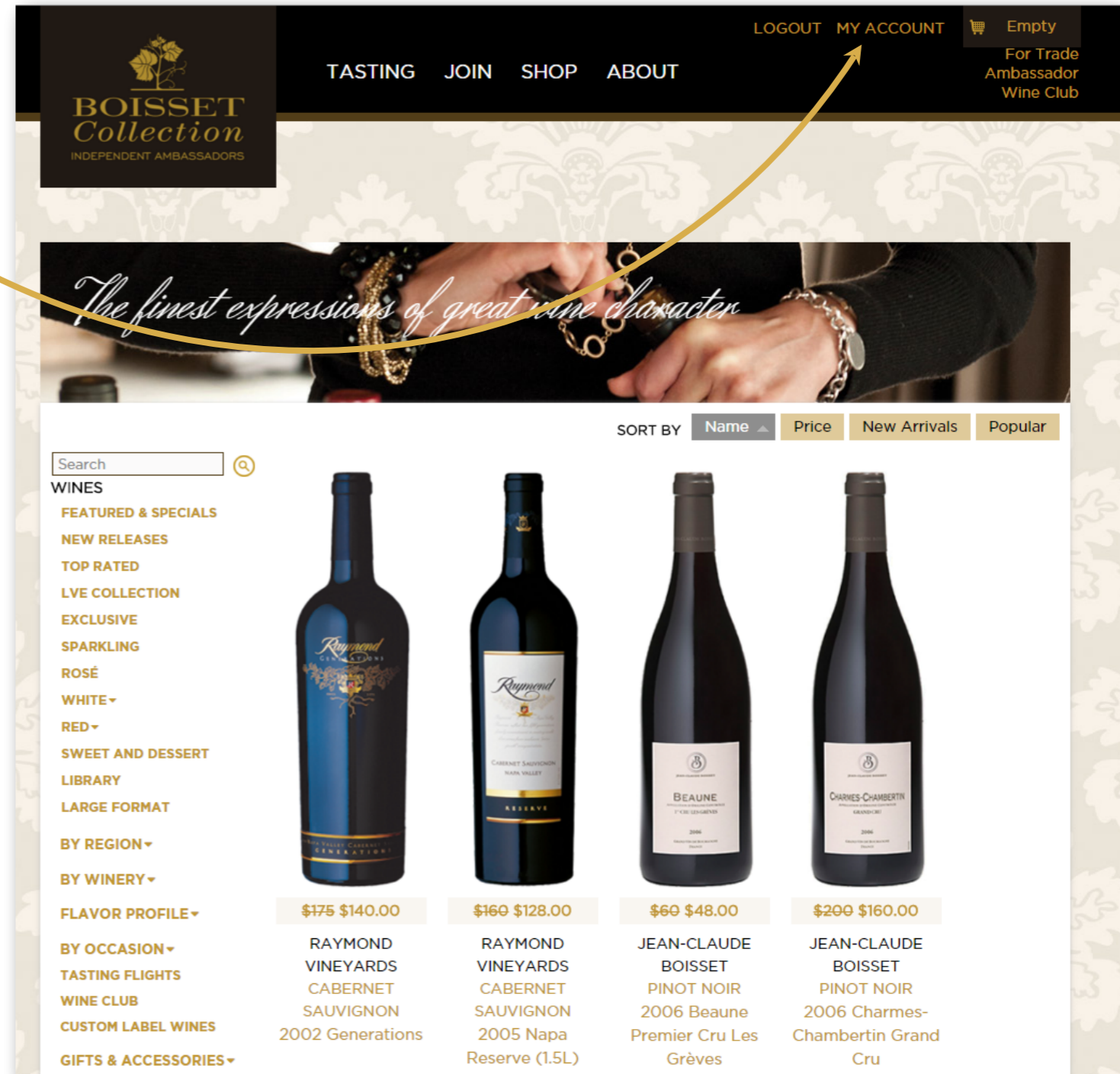
CUSTOMER REPORT IN SELECT DATE RANGE

FIRST NAME	LAST NAME	PLACE ORDER	WINE CLUB MEMBER	WINE C
[blurred]	[blurred]	PLACE ORDER	false	
[blurred]	[blurred]	PLACE ORDER	true	Wine C
[blurred]	[blurred]	PLACE ORDER	false	
[blurred]	[blurred]	PLACE ORDER	false	
[blurred]	[blurred]	PLACE ORDER	false	
[blurred]	[blurred]	PLACE ORDER	false	
[blurred]	[blurred]	PLACE ORDER	false	
[blurred]	[blurred]	PLACE ORDER	false	
[blurred]	[blurred]	PLACE ORDER	false	
[blurred]	[blurred]	PLACE ORDER	true	Wine C
[blurred]	[blurred]	PLACE ORDER	false	
[blurred]	[blurred]	PLACE ORDER	false	
[blurred]	[blurred]	PLACE ORDER	false	
[blurred]	[blurred]	PLACE ORDER	true	Win

## Steps (Cont'd.)

4. Now that you are logged into your customer's account, click the “My Account” link on the upper right side of the website.

- If your customer has added items to their cart, they will be saved until the customer either completes checkout or removes the item from the cart.
- Your contact information as their Ambassador will always display on their account.



LOGOUT MY ACCOUNT Empty For Trade Ambassador Wine Club

TASTING JOIN SHOP ABOUT





*The finest expressions of great wine character*

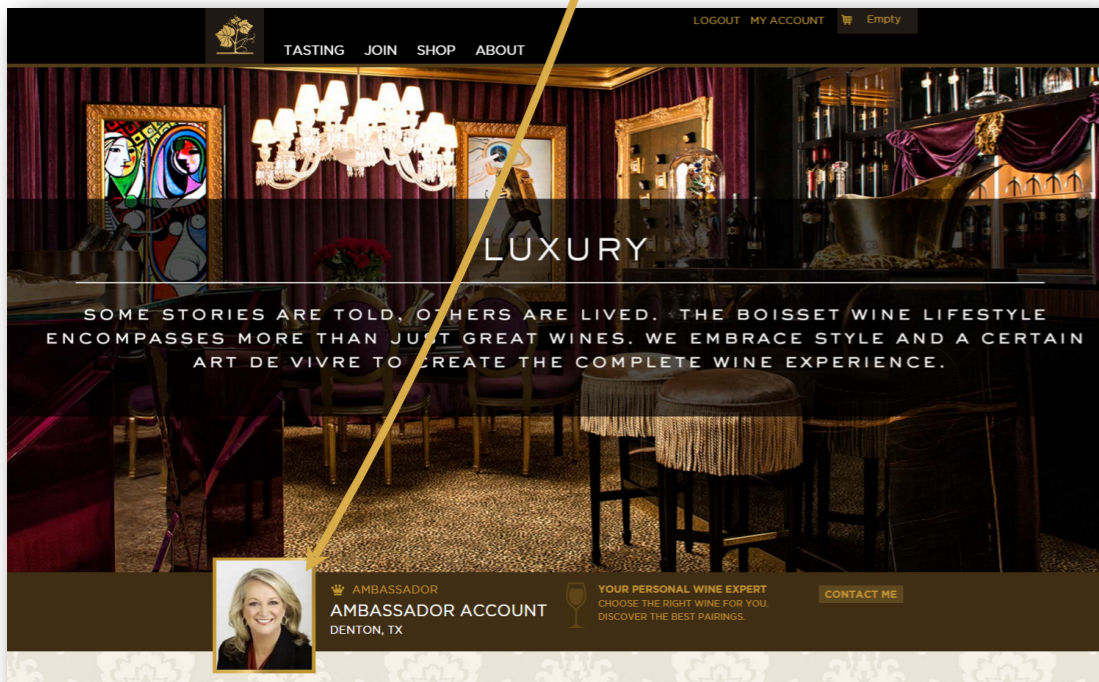
SORT BY Name Price New Arrivals Popular

Search

WINES

- FEATURED & SPECIALS
- NEW RELEASES
- TOP RATED
- LVE COLLECTION
- EXCLUSIVE
- SPARKLING
- ROSÉ
- WHITE
- RED
- SWEET AND DESSERT
- LIBRARY
- LARGE FORMAT
- BY REGION
- BY WINERY
- FLAVOR PROFILE
- BY OCCASION
- TASTING FLIGHTS
- WINE CLUB
- CUSTOM LABEL WINES
- GIFTS & ACCESSORIES

				
	\$175 \$140.00	\$160 \$128.00	\$60 \$48.00	\$200 \$160.00
	RAYMOND VINEYARDS CABERNET SAUVIGNON 2002 Generations	RAYMOND VINEYARDS CABERNET SAUVIGNON 2005 Napa Reserve (1.5L)	JEAN-CLAUDE BOISSET PINOT NOIR 2006 Beune Premier Cru Les Grèves	JEAN-CLAUDE BOISSET PINOT NOIR 2006 Charmes-Chambertin Grand Cru



LOGOUT MY ACCOUNT Empty

TASTING JOIN SHOP ABOUT

LUXURY

SOME STORIES ARE TOLD. OTHERS ARE LIVED. THE BOISSET WINE LIFESTYLE ENCOMPASSES MORE THAN JUST GREAT WINES. WE EMBRACE STYLE AND A CERTAIN ART DE VIVRE TO CREATE THE COMPLETE WINE EXPERIENCE.

AMBASSADOR ACCOUNT  
DENTON, TX

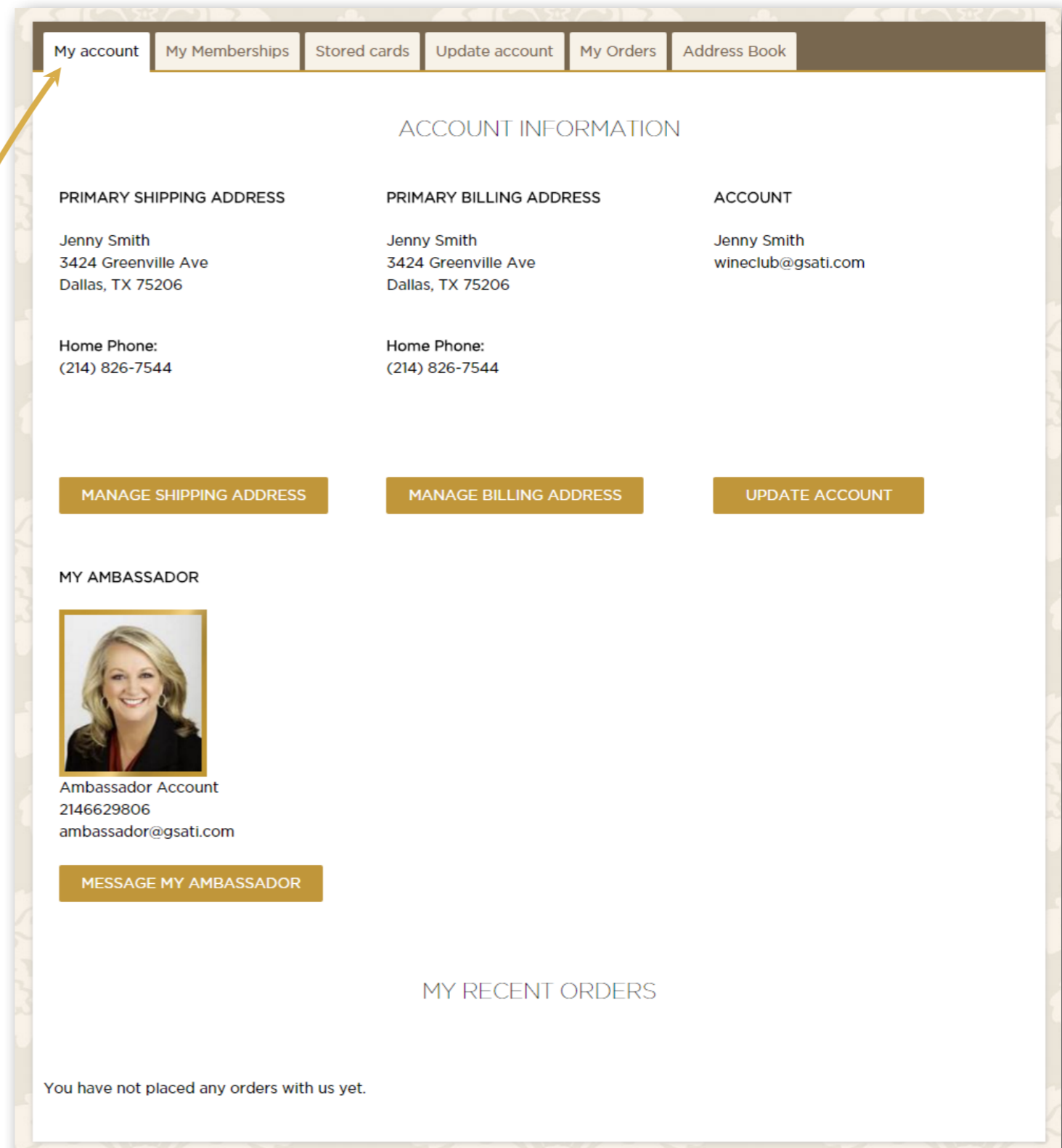
YOUR PERSONAL WINE EXPERT  
CHOOSE THE RIGHT WINE FOR YOU.  
DISCOVER THE BEST PAIRINGS.

CONTACT ME

## My Account Tab

Now that you are in the customer's account, you can manage all of their information.

- The “My Account” tab gives you most of the primary information on the account.
- The “My Memberships” tab shows their current Wine Club Memberships (Page 5).
- The “Stored Cards” tab shows credit cards on file and allows you to manage them (Page 6).
- The “Update Account” tab allows them to update login information (Page 7).
- The “My Orders” tab displays all of their order history (Page 8).
- The “Address Book” tab allows them to manage all addresses that they have saved to their account (Page 9).

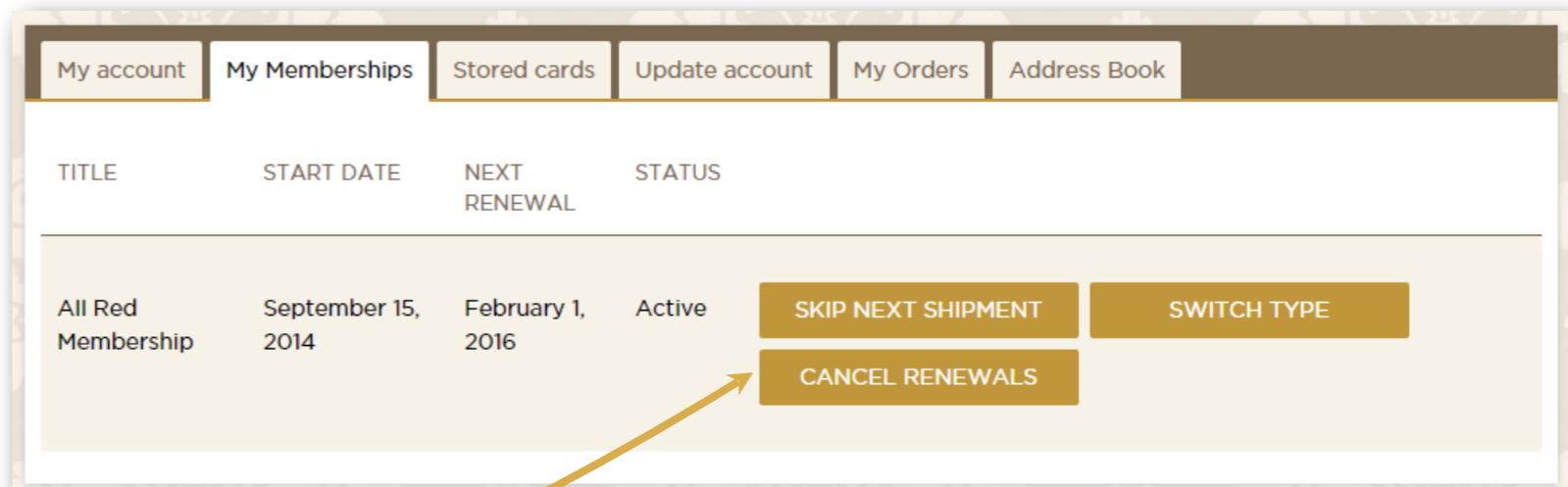


The screenshot shows a user interface for account management. At the top is a navigation bar with tabs: My account, My Memberships, Stored cards, Update account, My Orders, and Address Book. The 'My account' tab is selected and highlighted. Below the navigation bar is the 'ACCOUNT INFORMATION' section, which is divided into three columns: PRIMARY SHIPPING ADDRESS, PRIMARY BILLING ADDRESS, and ACCOUNT. Each column contains contact information for Jenny Smith, including address and phone number. Below this information are three buttons: MANAGE SHIPPING ADDRESS, MANAGE BILLING ADDRESS, and UPDATE ACCOUNT. The next section is 'MY AMBASSADOR', featuring a profile picture of a woman, her name 'Ambassador Account', and contact details. A button labeled 'MESSAGE MY AMBASSADOR' is positioned below the profile. The final section is 'MY RECENT ORDERS', which currently displays the message: 'You have not placed any orders with us yet.'

## My Memberships Tab

This tab allows your customer to view their current and past wine club memberships.

- Past Memberships will show a “Canceled” status.
- Current Memberships will show an “Active” status.
- You can choose to skip their next shipment, change their wine club type, or cancel their membership if needed.
- If you or your customer cancels a wine club membership accidentally, please contact Customer Care and we will reinstate the membership.

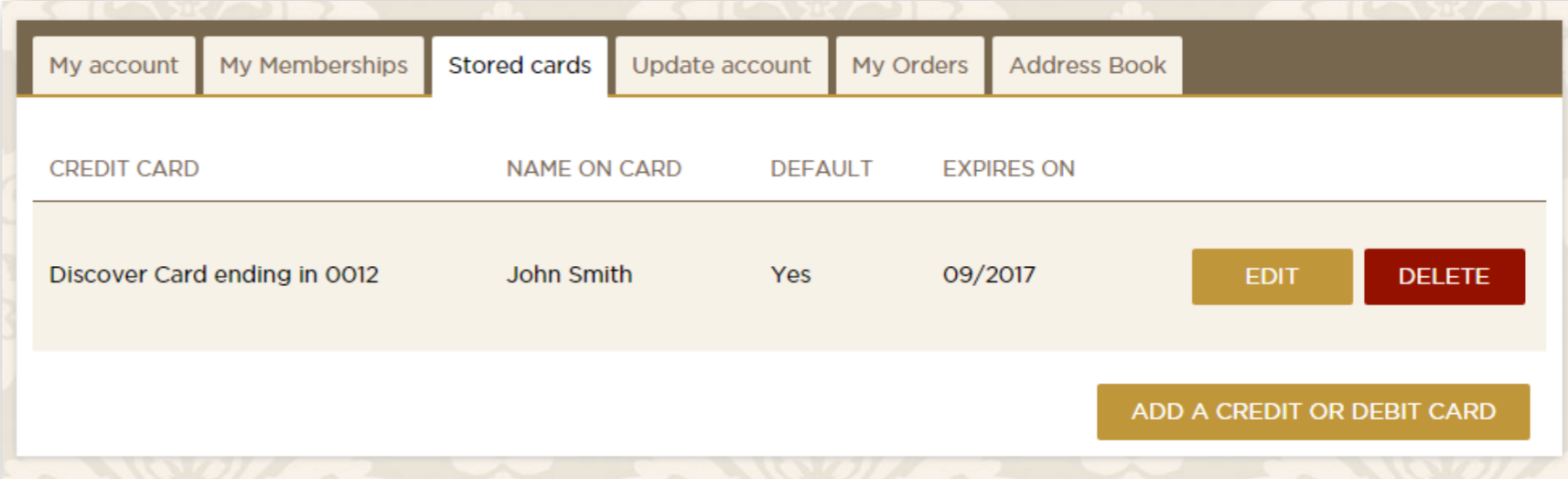


TITLE	START DATE	NEXT RENEWAL	STATUS	
All Red Membership	September 15, 2014	February 1, 2016	Active	<a href="#">SKIP NEXT SHIPMENT</a> <a href="#">SWITCH TYPE</a> <a href="#">CANCEL RENEWALS</a>

## Stored Cards Tab

From this tab, customers can update their credit cards stored on their account.

- Click Edit if you would like to change the information for an existing card.
- Click Delete if you want to remove this card from the account.
- You can also add a new card by clicking 'Add a Credit or Debit Card' below.



The screenshot shows the 'Stored Cards' tab selected in a navigation menu. The menu includes 'My account', 'My Memberships', 'Stored cards', 'Update account', 'My Orders', and 'Address Book'. Below the menu is a table with the following columns: 'CREDIT CARD', 'NAME ON CARD', 'DEFAULT', 'EXPIRES ON', and two action buttons: 'EDIT' and 'DELETE'. A single card is listed: 'Discover Card ending in 0012', 'John Smith', 'Yes', and '09/2017'. Below the table is a button labeled 'ADD A CREDIT OR DEBIT CARD'.

CREDIT CARD	NAME ON CARD	DEFAULT	EXPIRES ON		
Discover Card ending in 0012	John Smith	Yes	09/2017	EDIT	DELETE

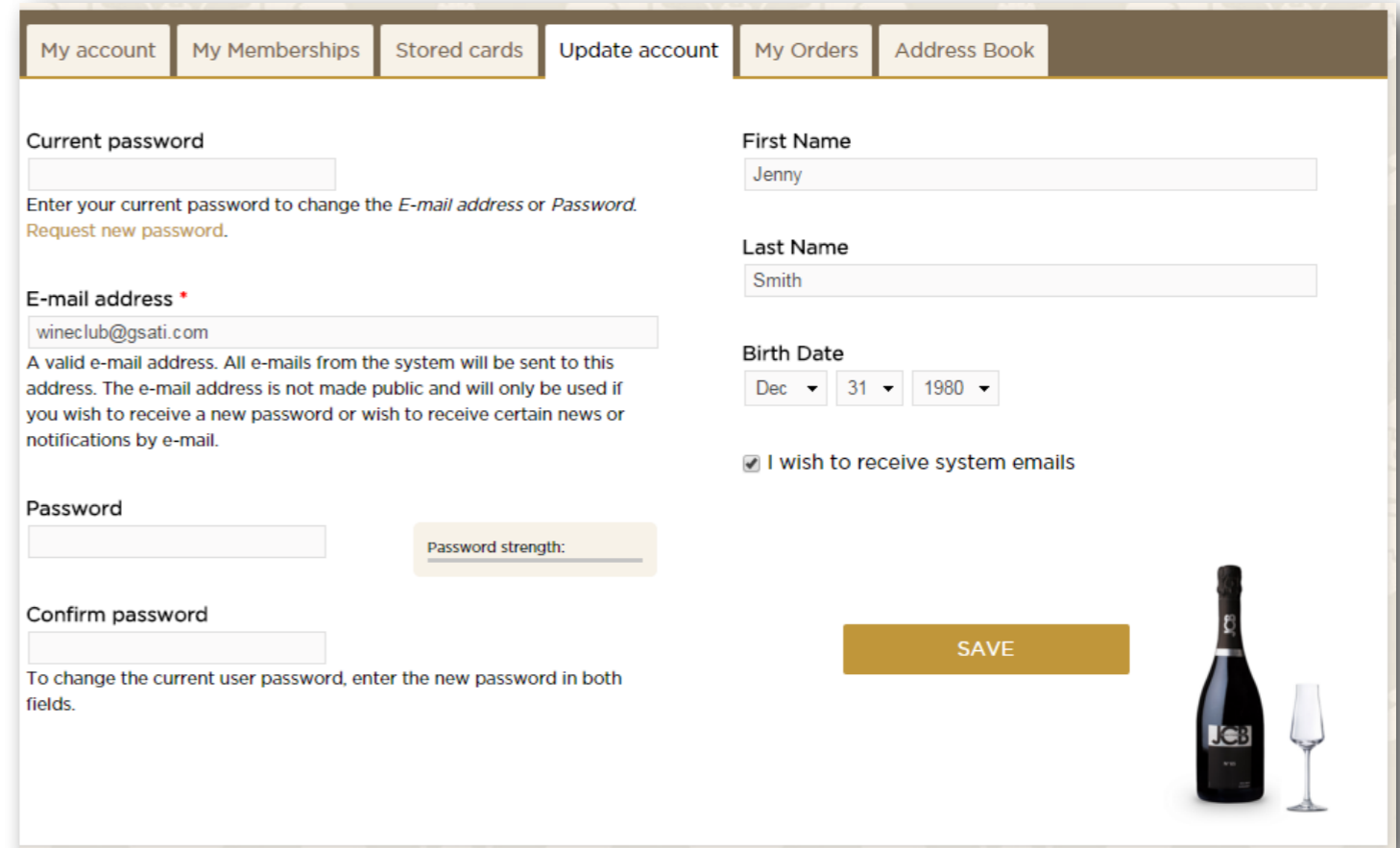
ADD A CREDIT OR DEBIT CARD

## Update Account Tab

From this tab, customers can update the main login information on their account.

From here you can:

- Update their email address.
- Update their password.
- Change the name on their account.
- Update their date of birth.
- Change whether they would like to receive system emails.
- Any information that is changed will be saved after clicking the “Save” button.
- Note that you will have to type in their current password in the top left field to change the email address or set a new password.



My account | My Memberships | Stored cards | **Update account** | My Orders | Address Book

Current password  
  
 Enter your current password to change the *E-mail address* or *Password*.  
[Request new password.](#)

E-mail address \*  
  
 A valid e-mail address. All e-mails from the system will be sent to this address. The e-mail address is not made public and will only be used if you wish to receive a new password or wish to receive certain news or notifications by e-mail.

First Name

Last Name

Birth Date


I wish to receive system emails

Password  
 Password strength:

Confirm password

To change the current user password, enter the new password in both fields.

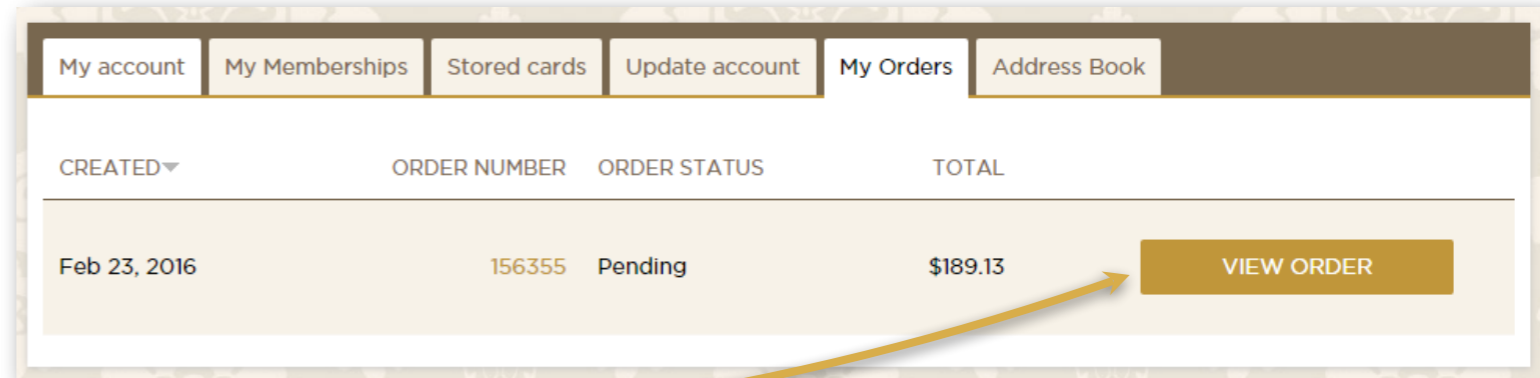
**SAVE**



### My Orders Tab

From this tab, your customer can see all of their order history and get details on each order.

- To view order details, just click on the “View Order” button.
- Orders will show the date of the order, the order number, status of the order, and the total from this page.



CREATED▼	ORDER NUMBER	ORDER STATUS	TOTAL	
Feb 23, 2016	156355	Pending	\$189.13	<a href="#">VIEW ORDER</a>



### Address Book Tab

From this tab, your customer can view/edit/delete any address that has been saved in their account.

- Click on the “Edit” Link to edit the address that needs to be changed.
- Click on the “Delete” link to remove the address from the address book.
- Use the tabs at the top for choosing if you would like to view Billing Addresses or Shipping Addresses.
- Click 'Add Billing Address' or 'Add Shipping Address' in either tab to add a new address and complete the fields.

