Campaign Manager

eCommerce Industries, Inc.

ddms distribution software

April 2007 Item # H-CAMPMGR

Contents

About Campaign Manager **3**

Campaign Manager Requirements **4**

Setting Up Parameters **5**

Setting Up Campaign Manager **7**

Using the Campaign Manager Window **9**
- Creating Campaigns 9
- Editing Campaigns 13
- Deleting Campaigns 13
- Setting Up Campaign Schedules 14
- Running Campaigns Manually 15
- Viewing the Campaign Activity Log 16

About Campaign Manager

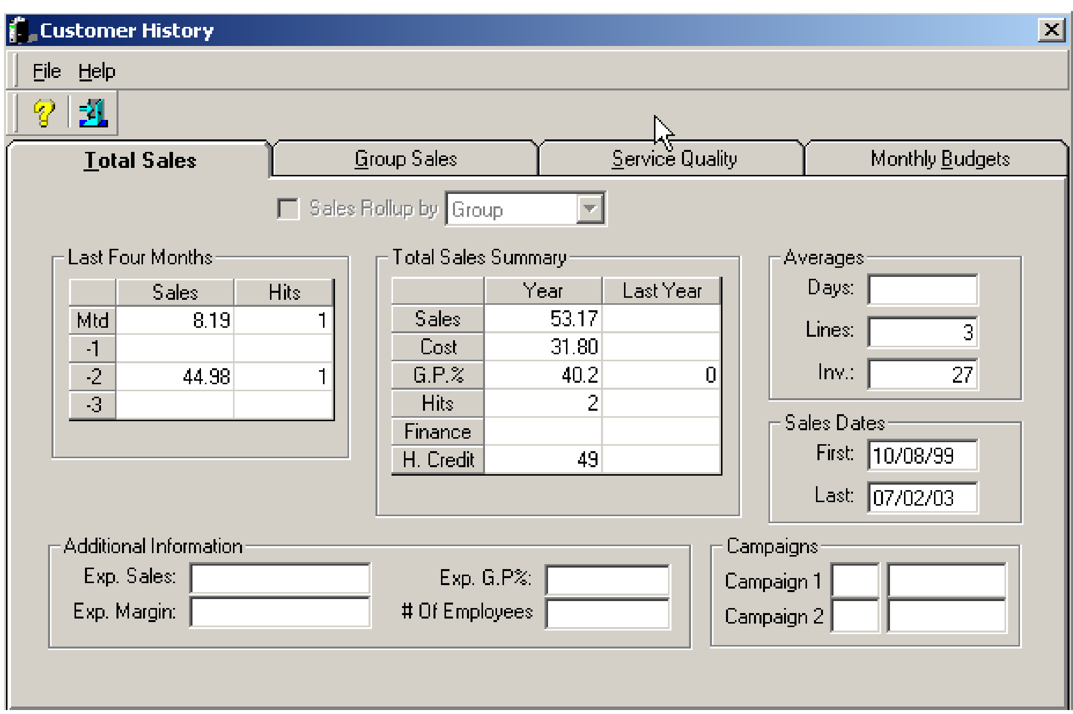
Campaign Manager lets you create automated marketing tasks based on a customer's status, such as new customers or growth customers. You can send emails to both internal and external customers. For example, if a customer hasn't made any purchases recently, you might email their salesperson internally to notify them. You could also email marketing flyers or perhaps a discount offer. Campaign Manager lets you automatically recognize and react to customers who haven't purchased recently. You simply set up the campaign and limit to the customers that fit your criteria.

Using Campaign Manager, you can apply the campaigns in any order simply by moving them up or down. You can create new campaigns or modify and delete campaigns. Campaign Manager allows you to run campaigns manually or automatically. Campaign descriptions are shown in the Campaign Manager window.

For more information on Notes Everywhere, refer to your Ensite Pro online help.

Campaign Manager works with Notes Everywhere. Before using Campaign Manager, you must first set up Notes Everywhere. You must set up parameters in the Notes Everywhere Parameters and set up note codes in the Note Setup dialog box.

Figure 1: The Customer History Total Sales Tab



Note: This feature is not included in all software packages and requires authorization. Campaign Manager is in the Platinum package and packages C and D. For more information, contact ECI² sales. To use Campaign Manager, you must also be authorized for Notes Everywhere.

Two boxes in the Customer History Total Sales tab contain the last two active campaigns for this customer. The campaign code and the last activity date for these campaigns are displayed in the Campaign 1 and Campaign 2 boxes, as shown in Figure 1. This information is for display only and is stored in the C-SUPP file. You can also use these boxes for reporting purposes.

Campaign Manager Requirements

There some considerations you should make before setting up Campaign Manager.

- You must have a valid SMTP server to send internal or external emails using Campaign Manager or Notes Everywhere.
- You cannot use a dial-up internet connection.
- Some anti-virus software programs prevent mass emails from being sent. You may have to configure your DDMS Server anti-virus software to disable this feature or shut down your anti-virus software when sending mass emails internally or externally.

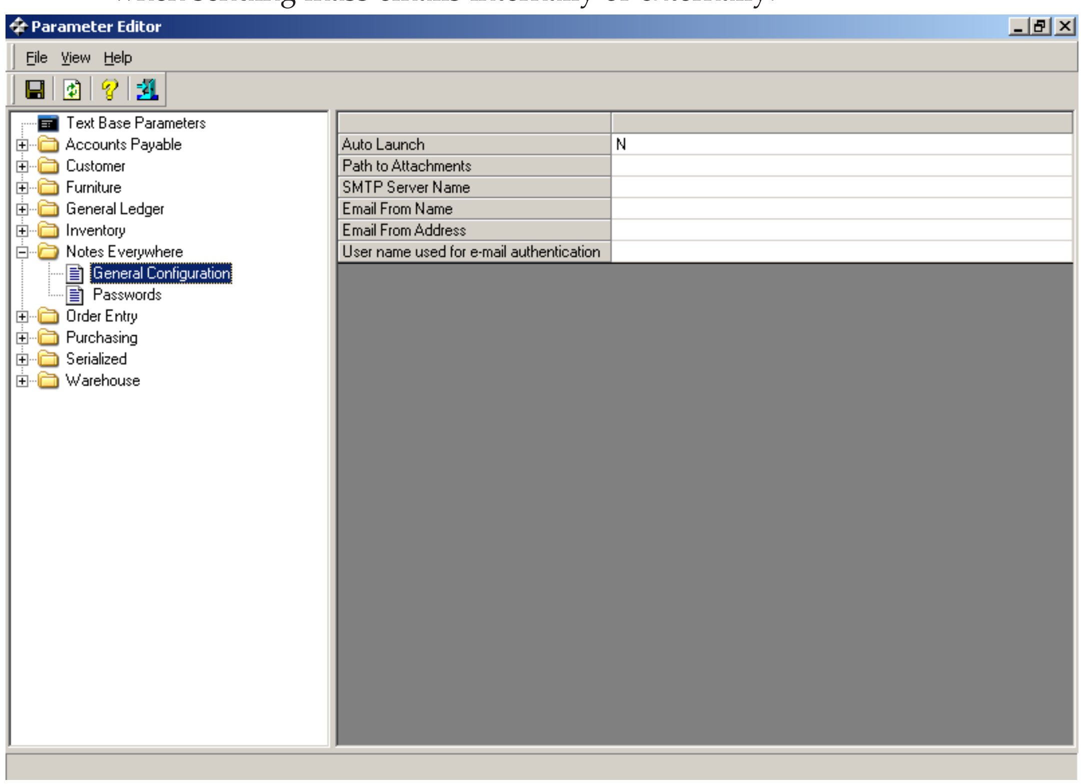


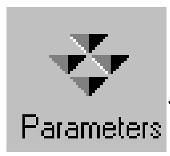
Figure 2: The Notes Everywhere Parameters

- You should always make sure you have a valid backup on hand. For more information, see **Backing Up SQL Data (Version 7.11 and above)** on our web site at http://www.ddms.com/Resources/Support/faq/utilities/711SqlBak.pdf

Setting Up Parameters

Before using Campaign Manager, you must set up parameters. You set up parameters for Campaign Manager in the Notes Everywhere Parameters.

1 From the Ensite Pro Master Menu, double-click 

, then double-click 

.

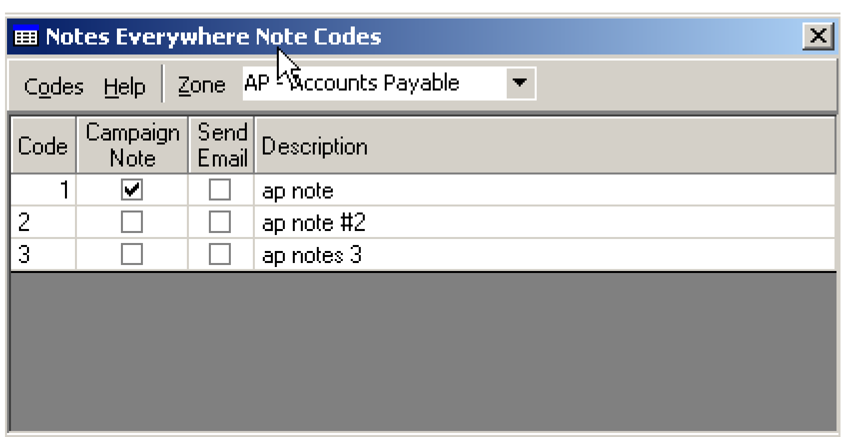
2 From the Parameter Editor window, double-click Notes Everywhere.

3 Click General Configuration.

4 In these boxes, specify parameters for Campaign Manager. See Figure 2.

In the Path to Attachments text box, enter the path where attachments are stored. *Attachments must be stored on a network for this function to work.* (This box works with Notes Everywhere and Campaign Manager.)

Figure 3: The Notes Everywhere Note Codes Window



Note: The Auto Launch box is for Notes Everywhere setup.

5 In the SMTP Server Name text box, enter the IP address from which emails are sent. *This box must be completed for the email function to work.* (This box works with Notes Everywhere and Campaign Manager.)

6 In the Email From Name, enter the email name from which you are sending the email, for example, ECI2Marketing. (This box works with Notes Everywhere and Campaign Manager.)

7 In the Email From Address, enter the email address from which you are sending the email, for example, marketing@eci2.com. *This box must be completed for the email function to work.* (This box works with Notes Everywhere and Campaign Manager.)

8 In the User Name Used for E-mail Authentication box, enter the user name for your Microsoft Exchange Server. (This box works with Notes Everywhere and Campaign Manager.)

9 In the Notes Everywhere parameters, click Passwords.

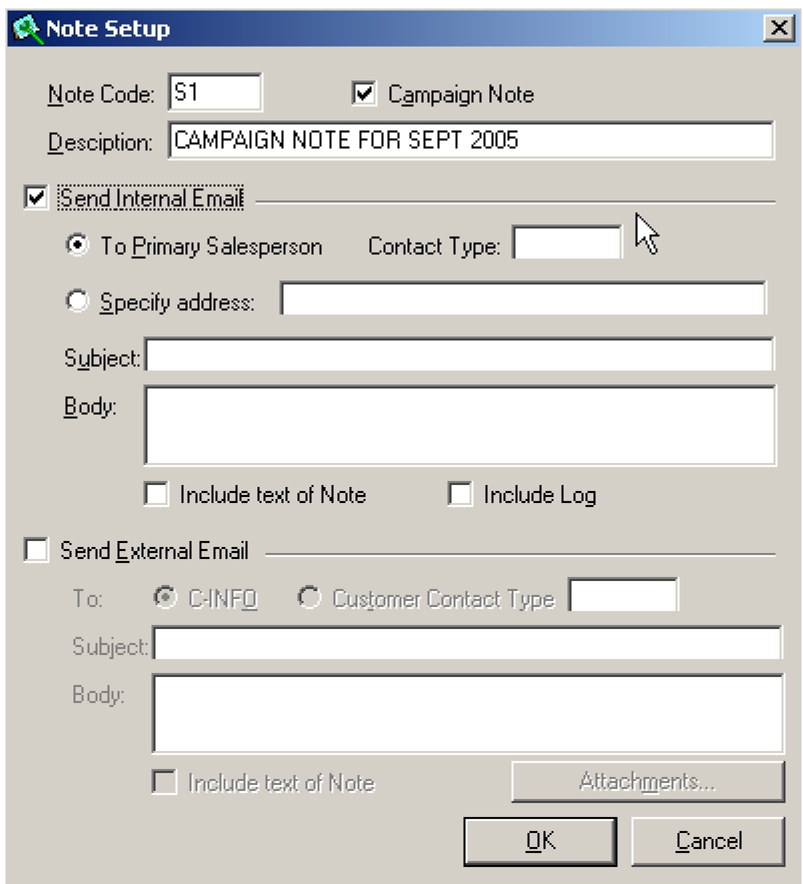
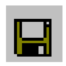


Figure 4: The Note Setup Dialog Box

10 In the Authenticate User Password text box, enter the password for your Microsoft Exchange Server. (This box works with Notes Everywhere and Campaign Manager.)

Note: The other password boxes in this window only apply to Notes Everywhere.

---

11 Click  to save your changes.

Setting Up Campaign Manager

1 From the Ensite Pro Master Menu, click Databases then select Notes. Click Notes Setup.

Note: If you set up passwords in the Notes Everywhere Parameters, you are prompted for the password you entered in the Setup Password text box. Enter the password and click OK.

---

2 The Notes Everywhere Note Codes window opens, as shown in Figure 3. You can set up notes for A/P, A/R, Customers, Furniture, Order Entry, Purchase Order Entry, and Vendors. This window displays the notes you have created. You can also create new codes, modify codes, or delete codes. You use this code to identify notes throughout the system.

This window displays the user-defined note code, whether this note is for use with Campaign Manager, whether you specified to send an email, and the note code description.

First, you must select the zone for which to create a note. Click the drop down arrow in the Zone box and select the zone, Customer, for example.

3 To add a code, click Codes then select Add Code. (You can also right-click the Code or Description boxes to add, open, or delete codes.)

4 The Note Setup dialog box opens, shown in Figure 4. Enter the user-defined code for this note in the Note Code box.

5 Click Campaign Note.

6 Enter a description for this note in the Description box.

7 If you are emailing this note, you must select either Send Internal Email or Send External Email or you can select both.

To send an internal email, click Send Internal Email. Go to **Step 8**.

To send an external email, click Send External Email and go to **Step 14**.

8 Click the To Primary Salesperson button to send the internal email to the primary salesperson for the account. (This information comes from the C-MASTER file.) If you want to enter a specific address, go to **Step 10**.

9 You can enter the contact type in the Contact Type box. (This information comes from the Type box in the Contact database.) Entering a contact type lets you specify which address to use for this salesperson or to enter a specific address, go to **Step 10**.

Note: For more information on the Contact database, see your Ensite Pro online help.

---

10 Use the Specify Address box to enter the email address for this salesperson.

11 Enter the subject of the email in the Subject box.

12 Enter the text of the email in the Body box.

13 You can also include the text of the note with this email. To do this, click Include Text of Note.

14 You can also include the log with this email. When you run a campaign, a log is created specifying to which customers the campaign was sent. The log contains the customer list showing which names were removed or added. To send the log with the email, click Include Log. If you are sending an external email as well, go to **Step 14**. If you are finished, go to **Step 21**.

The C-INFO file contains additional customer name and contract information, which is displayed in the Additional Name and Contact boxes in the Master tab of the Customer window.

15 Now, complete the boxes for sending an external email. First, you must select to whom you are sending the email. If you click C-INFO, all the customers in the Customer Master tab with an email address in the E-Mail box receive the campaign.

16 If you store customer email addresses in the Contact database, you may want to use those email addresses. To do this, click Customer Contact Type then enter the contact type in the text box.

Note: For more information on the Contact database, see your online help.

---

17 In the Subject box, enter the email subject.

18 In the Body box, enter the body text for this email.

19 You can also include the text of the note with this email. To do this, click Include Text of Note.

20 To add an attachment to this note, click Attachments and select a file as you normally would. This button defaults to the Path to Attachments text box you set up in parameters.

21 When finished, click OK.

22 The system returns to the Notes Setup window displaying the note you just created. This window displays the user-defined note code, whether this note is for use with Campaign Manager, whether you specified to send an email, and the note code description.

Using the Campaign Manager Window

The Campaign Manager window lets you create new campaigns, edit campaigns, and delete campaigns. You can run campaigns manually or set up a schedule. You can view a log of campaigns that have been run.

In the Campaign Manager window, you can highlight a campaign and the criteria for that campaign displays in the lower portion of the window. The order that the campaigns are listed in this window sets the campaign priority. You can change the priority of campaigns using the drag and drop method. You can click  to save the campaign order in this window.

Creating Campaigns

1 From the Ensite Pro Master Menu, click Databases then select Notes.

2 Click Campaign Manager.

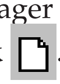
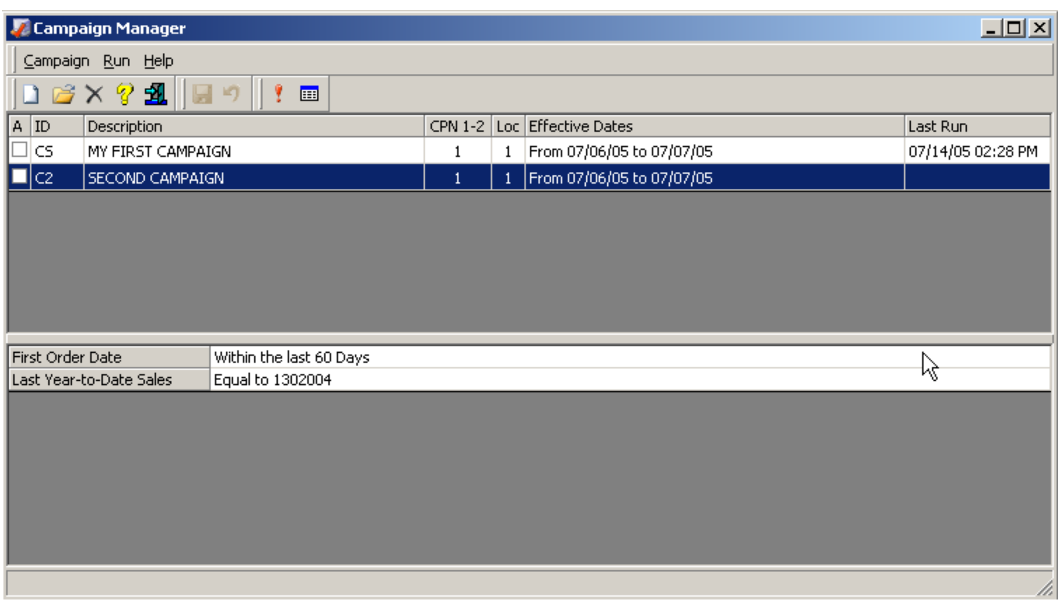
3 The Campaign Manager window opens, shown in Figure 5. To create a new campaign, click .

Figure 5: The Campaign Manager Window



4 The Campaign Wizard dialog box opens, shown in Figure 6. You set up the campaign on the left side of the window and set up the corresponding note information on the right side of the window.

In the ID box, enter the user-defined two-digit identification code to assign to this campaign.

5 In the Description box, enter a description for this campaign.

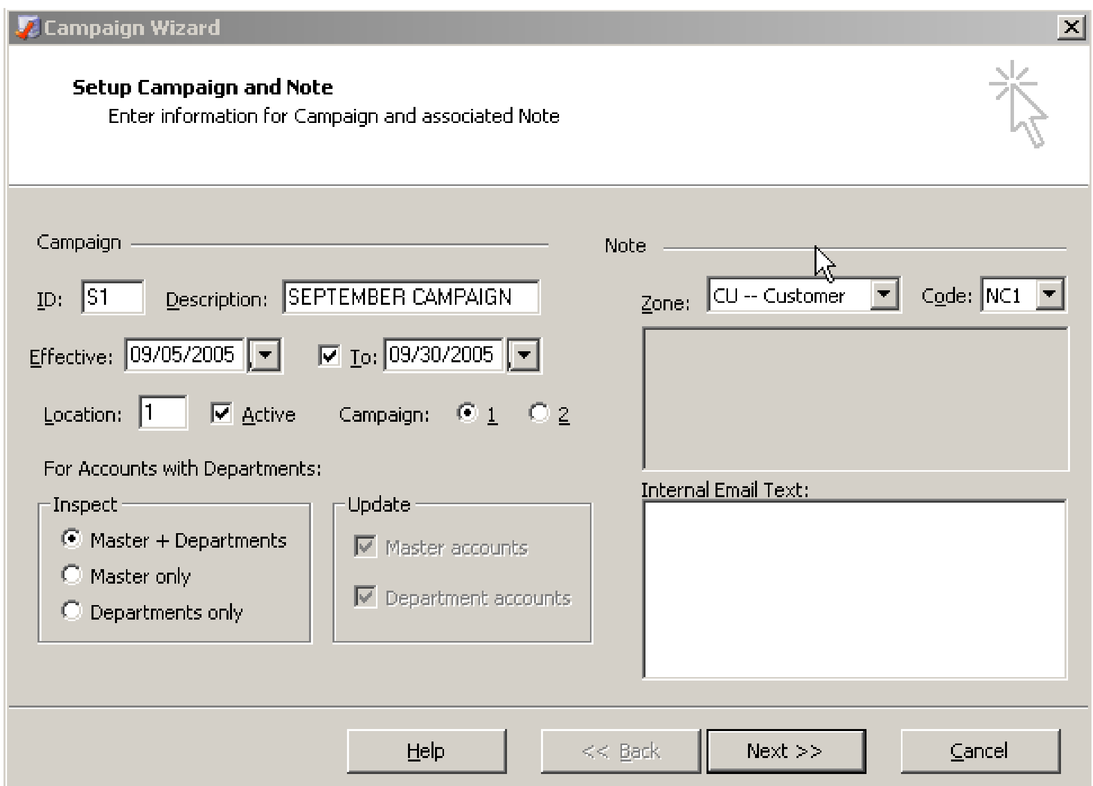
6 To enter a date for this campaign, click the down arrow in the Effective box and select a date.

7 To enter an ending date for this campaign, click the To check box. Then click the down arrow to select the ending date. If no ending date is selected, the campaign is active until it is manually deleted.

8 In the Location box, enter the general ledger location.

9 Use the Active check box to specify whether this campaign is currently active. If not, clear this box. *You must check this box for this campaign to run.*

Figure 6: The Campaign Wizard Dialog Box



10 Click the Campaign 1 or 2 button to specify whether this is Campaign 1 or 2. This updates the corresponding Campaign box in Customer History. Campaign order determines priority.

Note: If you execute a campaign manually, the campaign information does not override any previous information stored in Customer History.

---

11 In the Inspect and Update boxes, you can select which customer records to search for matching criteria for this campaign and select which customer records to update with this information.

To search all customer departments including the master department, click Master + Departments. The master account plus all customer departments are automatically updated with this campaign information.

To search only the master department, click Master Only. If you select this option, you can also select which records to update in the Update boxes. You can select to update the master account or department accounts or both. Click the Master Accounts and/or Department Accounts boxes to update.

To search only departments, click Departments Only. Department accounts are automatically updated with this campaign information.

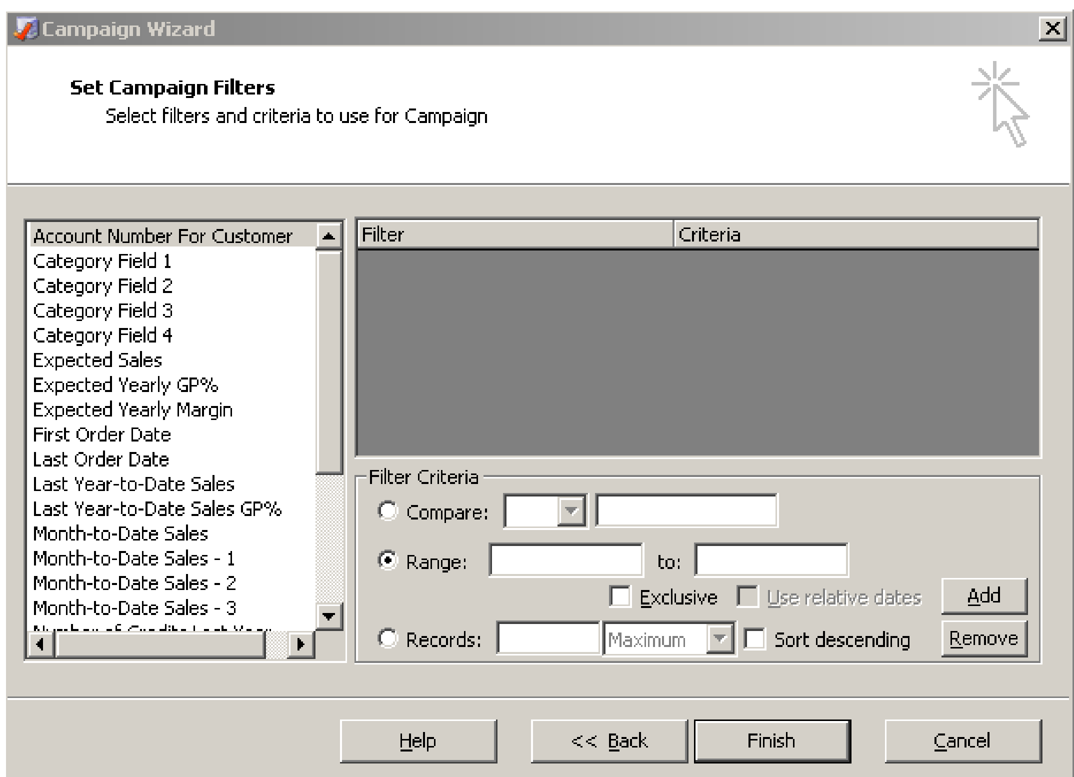


Figure 7: Setting Campaign Filters

Note: If you select to search customer departments, all accounts with no departments are searched and updated if matching criteria is found.

12 Next, set up the note information. Use the Zone box to select the Note for this campaign. Click the down arrow and select the zone. When you select the Zone, the corresponding note code appears in the Code box. You can change the Code by using the drop down arrow to select another code.

13 If you entered external email text in the Note Setup dialog box, that email information is displayed here. To send an internal email with this campaign, enter the text in the Internal Email Text box.

14 When you complete the boxes in this dialog box, click Next.

15 Use this window to set up campaign filters or limits. Highlight the filter on the left, as shown in Figure 7, then set the criteria for that filter. For example, if you select Salesperson, you might enter a range of salesperson numbers in the Range boxes. Then click Add to add this filter to your campaign.

16 Use the Compare boxes to specify whether to limit by numbers that are greater than, less than, or equal to the numbers entered in these boxes. For example, if you limit by year-to-date sales, you would click Compare then specify whether to limit by sales greater than, less than, or equal to by using the drop down arrow. Then, enter the number in the last box.

17 Use the Range boxes to enter a range of numbers, such as Salesperson numbers.

18 The Exclusive check box works with the Range boxes. After entering a range, you can click Exclusive to limit by numbers outside of the range you set.

19 Use the Records boxes to specify sales by maximum, top percent, or bottom percent. Click Records then specify the number in the next box. Then, use the drop down arrow to specify maximum, top percent, or bottom percent.

Note: The Records boxes can only be used with one limit in this campaign. The other boxes, such as Range or Compare, can be used on many limits.

20 The Relative Dates check box works with the Range boxes. For example, to limit by First Order Date, click Use Relative Dates. Then, the Range boxes let you set a range within the last number of days, weeks, months, or years.

21 Use the Sort Descending check box with the Records boxes. Check this box to sort records in descending order.

22 As you select the criteria to use, click Add to apply it. To remove a filter, highlight it and click Remove.

23 When finished, click Finish to create the campaign. To not create the campaign, click Cancel. You can also click Back at any time to go back to the first window.

24 The system returns to the Campaign Manager window. The campaign you created now appears in this window.

Editing Campaigns

1 In the Campaign Manager window, highlight the campaign to edit. You can select edit in three ways:

- Right-click and select Edit
- Type **Ctrl + O**
- From the menu at the top of the screen, click Campaign then select Edit Campaign.

2 The Campaign Wizard dialog box opens. You set up the campaign on the left side of the window and set up the corresponding note information on the right side of the window. For more information on the boxes in this dialog box, refer back to the heading **Creating Campaigns**.

3 When finished, click Finish to create the campaign. To not create the campaign, click Cancel. You can also click Back at any time to go back to the first window.

4 The system returns to the Campaign Manager window. The campaign you created now appears in this window.

Deleting Campaigns

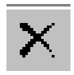
You can delete campaigns in the Campaign Manager window. Before you can delete a campaign, make sure the campaign is inactive and has no customers assigned. Before you can delete a campaign, you must:

- Run the scheduled task
- Clear the Active box in the Campaign Wizard.

Use the following steps to delete a campaign:

1 In the Campaign Manager window, highlight the campaign to delete. You can select delete in four ways:

- Right-click and select Delete

- Click 
- Type **Shift + Del**
- From the menu at the top of the screen, click Campaign then select Delete Campaign.

Note: If this campaign has customers assigned, a message appears stating that this campaign cannot be deleted. To remove customers from a campaign, the campaign must be inactive and run as scheduled. This clears the campaign code from the customer database. Then, the campaign can be deleted.

---

2 The campaign is deleted.

Setting Up Campaign Schedules

You schedule campaigns from the Campaign Manager window. Schedules apply to all campaigns in the window. The order that the campaigns are listed in this window sets the campaign priority. Scheduling a campaign is very similar to setting up a scheduled task in Microsoft®. *Schedules must be created on the DDMS server.*

1 You can select Set Schedule in three ways:

- Click 
- Type **Ctrl + F5**
- From the menu at the top of the screen, click Run then select Set Schedule.

2 The Campaign Schedule dialog box opens. Use the drop down arrow in the Start Time box to select the start time for the campaign. Use the corresponding box to select AM or PM.

3 Use the Run As box to specify a network user name. For example, you might enter domain name\user name. This user *must have* network access and the ability to schedule tasks on the server. If the scheduled task requires administrator permissions to run, then this account must be a member of the Administrators group.

4 To set a password for this campaign schedule, click the Set Password button. Enter the password in the Password box and confirm the password by entering it again the Confirm Password box. (This password must be a network password for the user specified in Step 4.) Click OK.

5 In the Campaign Schedule dialog box, you must decide whether to run the campaign daily, weekly, or monthly.

If you select daily, click the Daily button and use the down arrows to select how many days to run the campaign.

If you select weekly, click the Weekly button and use the down arrows to select how many days to run the campaign and then select what day, Sunday, for example.

If you select monthly, click the Monthly button and use the down arrows to select which day of the month to run the campaign. You can further limit this by selecting the first, second, third, or fourth days and selecting a day of the week. For example, you might select the first Sunday of the month, as shown in Figure 8.

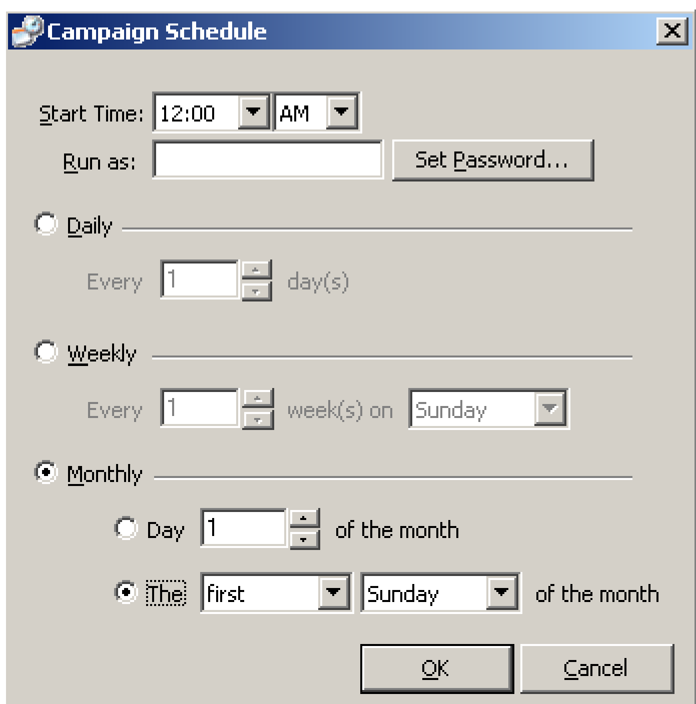
6 Click OK.

Running Campaigns Manually

You can run campaigns manually from the Campaign Manager window. However, if you run a campaign manually, the system ignores the effective dates that you set up in the Campaign Wizard.

1 Highlight the campaign to run.

Figure 8: Setting Up a Campaign Schedule



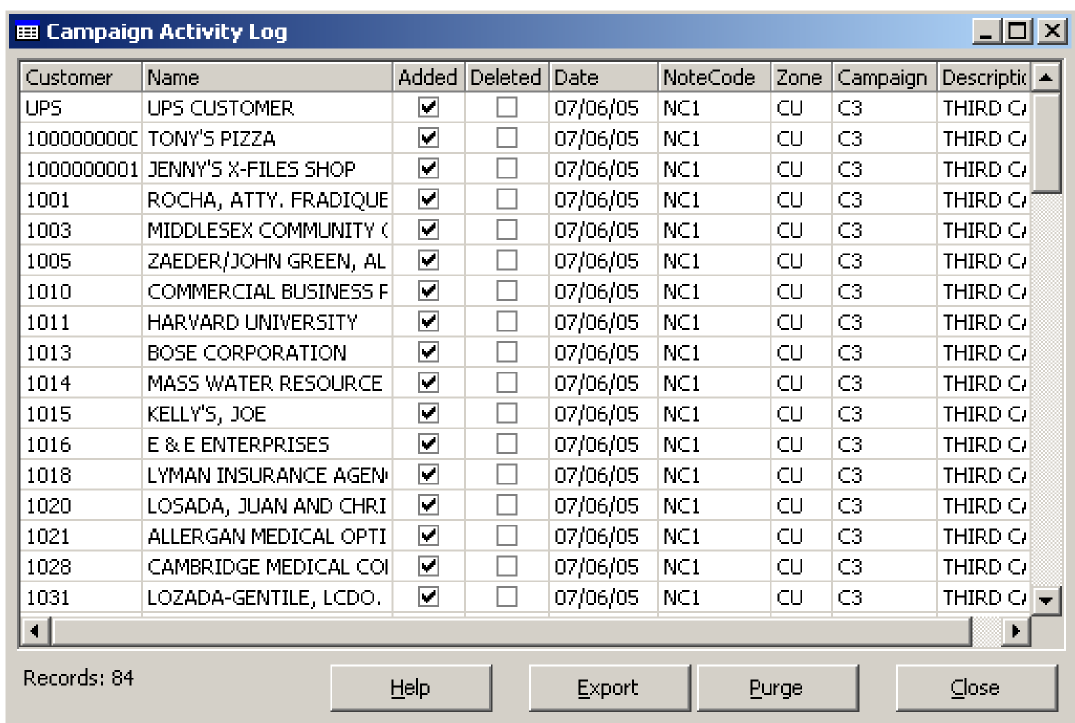
2 You can choose to run the campaign manually in four ways:
   - Click 
   - Type **F5**
   - Right-click and select Run Campaign
   - From the menu at the top of the screen, click Run then select Run Campaign.

3 The Campaign Execution message box appears. Several messages appear as the campaign is run. One message states how many customers were included in this campaign. When finished, the message Campaign Ran Successfully appears. The system returns to the Campaign Window.

Viewing the Campaign Activity Log

1 From the Campaign Manager window, click .

2 The Campaign Activity Log dialog box opens, as shown in Figure 9. You can sort the log by clicking on the buttons at the top, for example, sort by customer number or name.



Customer	Name	Added	Deleted	Date	NoteCode	Zone	Campaign	Descriptic
UPS	UPS CUSTOMER	☑	☐	07/06/05	NC1	CU	C3	THIRD C/
100000000C	TONY'S PIZZA	☑	☐	07/06/05	NC1	CU	C3	THIRD C/
1000000001	JENNY'S X-FILES SHOP	☑	☐	07/06/05	NC1	CU	C3	THIRD C/
1001	ROCHA, ATTY. FRADIQUE	☑	☐	07/06/05	NC1	CU	C3	THIRD C/
1003	MIDDLESEX COMMUNITY (	☑	☐	07/06/05	NC1	CU	C3	THIRD C/
1005	ZAEDER/JOHN GREEN, AL	☑	☐	07/06/05	NC1	CU	C3	THIRD C/
1010	COMMERCIAL BUSINESS F	☑	☐	07/06/05	NC1	CU	C3	THIRD C/
1011	HARVARD UNIVERSITY	☑	☐	07/06/05	NC1	CU	C3	THIRD C/
1013	BOSE CORPORATION	☑	☐	07/06/05	NC1	CU	C3	THIRD C/
1014	MASS WATER RESOURCE	☑	☐	07/06/05	NC1	CU	C3	THIRD C/
1015	KELLY'S, JOE	☑	☐	07/06/05	NC1	CU	C3	THIRD C/
1016	E & E ENTERPRISES	☑	☐	07/06/05	NC1	CU	C3	THIRD C/
1018	LYMAN INSURANCE AGEN	☑	☐	07/06/05	NC1	CU	C3	THIRD C/
1020	LOSADA, JUAN AND CHRI	☑	☐	07/06/05	NC1	CU	C3	THIRD C/
1021	ALLERGAN MEDICAL OPTI	☑	☐	07/06/05	NC1	CU	C3	THIRD C/
1028	CAMBRIDGE MEDICAL COI	☑	☐	07/06/05	NC1	CU	C3	THIRD C/
1031	LOZADA-GENTILE, LCDO.	☑	☐	07/06/05	NC1	CU	C3	THIRD C/

Figure 9: Viewing the Activity Log

The Added and Deleted columns display which customer accounts were added or deleted from a campaign.

You can export or purge the activity log. To export the log to a text file, click Export.

To purge the activity log, click Purge. The Purge function does not delete campaigns, it purges all data from this log file. To save this information, you may want to export to a file before purging.

3 When finished, click Close.