

ORDER POWER!

E-mail Campaigns

**User Guide
Release 4.0.3**



**Computer
Solutions,
Inc.**

Since 1978

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E-mail Campaigns

Setting up Marketing E-mails

The following things are required:

- Set up an **E-Mail Class** for receiving **Marketing E-Mails** (this step includes creating the letter)
- Set up the **Customer** record for receiving **Marketing E-Mails**

To set up an E-Mail Class for receiving Marketing E-Mails

1. From the **ORDER POWER! Main Menu**, select: **Work with Files** → **E-mail Class Codes** to display the *E-mail Class Inquiry panel*.
2. Press **F6** (Create) to display the *E-Mail Class Update panel* (figure 1).

- or -

Type **6** (Class/Type Details) beside an existing **E-mail Class** you want to work with, then press **Enter** to display *E-mail Class/Type Detail Inquiry panel* (figure 2).

```
OP! 4.0 DEVELOPMENT ** CO# 001
E-Mail Class Update

E-mail class
_____

F1=Help F3=Exit F12=Cancel
```

E-Mail Class Update panel (figure 1)

- 2a. In the **E-mail Class** field, type a code to identify the **E-mail Class** you are creating, then press **Enter** to display the **Description** field.
- 2b. In the **Description** field, type an identifying description of the **E-mail Class**. Press **Enter** to create the **E-mail Class** and redisplay the *E-mail Class Inquiry panel*.
3. Type **6** (Class/Type Details) beside an existing **E-mail Class** you want to work with, then press **Enter** to display *E-mail Class/Type Detail Inquiry panel* (figure 2).

```

OP! 4.0 DEVELOPMENT ** CO# 001
Position to : _____ E-mail Class/Type Detail Inquiry      Show Delete : N
BG$
Big $ Customer.
2=Change 5=Display
E-mail Type Description Del
- CCC Credit Card - Order Cancelled
- MARKET Marketing
- ORSHP Order was Shipped
- PHOUT Phase Out

F1=Help F3=Exit F6=Create F7=Bkwd F8=Fwd F12=Cancel F21=Print      Bottom

```

E-mail Class/Type Detail Inquiry panel (figure 2)

4. Press **F6** (Create) to display *E-mail Class/Type Detail Update panel* (figure 3).

```

OP! 4.0 DEVELOPMENT ** CO# 001
BG$
Big $ Customer.
E-mail Class/Type Detail Update

?E-mail Type
_____

F1=Help F3=Exit F4=?List F12=Cancel

```

E-mail Class/Type Detail Update panel (figure 3)

5. In the **E-mail Type** field, type “MARKET,” then press **Enter** to display the *E-mail Class/Type Detail Update panel* (figure 4).

```

                                OP! 4.0 DEVELOPMENT ** CO# 001
                                E-mail Class/Type Detail Update
E-mail Class  bg$      Big $ Customer.
E-mail Type   MARKET  Marketing

Send e-mail to the customer                N  Y/N

Subject line for the e-mail                _____
Override User ID to send e-mail           _____ Blank = Runtime User

where is the document located              _   I = In folder QDLS/PEMAIL, A = AS/400
If "I", what is the document name         _____

F1=Help  F3=Exit  F12=Cancel                Delete  _

```

E-mail Class/Type Detail Update panel (figure 4)

- Complete these fields:

Send e-mail to ordered-by customer

Type **Y**(es) to indicate that you want to send Marketing E-Mails **Ordered-By Customer**.

Subject line for the e-mail

Type the text you want to use for the “Subject” line of this e-mail message.

Override User ID to send e-mail

Type a User ID that you want to use as the “Sender” of the Marketing E-Mails. If this is left blank, **ORDER POWER!** will use the ID of the person running the job.

Where is the document located

Type a code to indicate the location of the document you want to use for the “Body” of this e-mail message.

I In IFS folder QDLS/PEMAIL (text file)

A On the AS/400 in a document you will be prompted to create in step 7.

If "I", what is the document name

Type the name of the document you want to use for the “Body” of this e-mail message. This document **MUST** be stored in IFS folder **QDLS/PEMAIL**.

- Press **Enter** to update the **E-mail Class/Type**. If you selected **A** (AS/400) in the **Where is the document located** field, **ORDER POWER!** displays *AS/4000 E-mail Message Entry panel (figure 5)*.


```

OP! 4.0 DEVELOPMENT ** CO# 001
Mail List Update

Customer Number      9473      Tired Customer
Name                CSI's Favorite Customer      Search Last Name _____
Position            Buyer
Company
Address             6187 NW 167TH ST
                   _____
                   _____

City, ?State        MIAMI      , FL
Zip Code,?Country  33015      , US
Daytime..x         _____ Ext _____ Evening..x _____ Ext _____ Fax _____
Telephones          305-266-9800 5
E-Mail Address      buyer@csiflorida.com
?Demographic Code
Abbreviation       AG NO PR NM CO TD 7 DE RN BR SP TS TS PR
?Customer Class    EMP ?E-Mail Class AND
?Added By          _____ ?Original Media AWB _____
Added              11/12/_8 ?Name Type 0
?Label Request     DEB Printed N Y/N ?Prefer Ship Via _____
Date
F1=Help F2=Unprotect F3=Exit F4=?List F5=Bypass Group1 F9=Retrieve F10=Add'l
F11=Ship Tos F12=Cancel F13=Defaults F14=Cust Notes F23=User F24=More

```

Mail List Update panel (figure 6)

- Complete these fields:

E-Mail Address

Type the Customer's E-Mail Address.

E-Mail Class

Type the Customer's E-Mail Class. **E-mail Classes** allow the user to define what e-mails should be sent for each customer, order, and vendor.

- Press **F10** (Add'l) to display *Mail List Update panel (figure 7)*.

```

OP! 4.0 DEVELOPMENT ** CO# 001
Mail List Update

Customer Number      9473      Name CSI's Favorite Customer
Type                _____ Happy Customer
Region
?Alert Class        BOZ
?SIC Code           _____ Discount _____ A/P
State Tax Exempt ID _____
Country Tax Exempt ID _____
?Payment Terms      N30
Credit Limit        _____ ?Billing Customer _____
Late Charge         _____ A/P ?Contact _____
Statements          N Y/N ?Ship To Customer _____
Backorders          Y Y/N ?Contact _____
Exclusion: Mail      N Y/N Action Code _____
Sell                N Y/N Action Date _____
Email               N Y/N Invoice By _____
Test
Gender              _____ Ship Segment N Y/N
SS#                 _____ PO Required N Y/N
First Order Date    12/11/98
F1=Help F3=Exit F4=?List F12=Cancel F14=Cust Notes F23=User F24=More

```

Mail List Update panel (figure 7)

- Type **N(o)** in the **Mail Exclusion** field, then press **Enter** through any remaining panels to update the Customer's Mail List record.

Sending the E-mails

After you have set up the customers and the E-mail Classes, the rest of the operation is nearly identical to standard **ORDER POWER!** Mail List Label Selection. These directions assume the user is already familiar with the **Select for Mailing** function in **Mail List Management**.

To send E-mails to a list

1. From the **ORDER POWER! Main Menu**, select: **Mail List Management** → **Select for Mailing** → to display the *Mail List Mailing Selection panels*.
2. Complete the selections as you see fit, press **Enter** after each panel. On the *Mail List Mailing panel* (figure 8), type **Y(es)** in the **Send E-mail instead, if eligible** field.

OP! 4.0 DEVELOPMENT ** CO# 001		
Mail List Mailing		
?Media/Src not assigned at Select	*ORIGINAL	*Original, Name
Label Information.....	<u>1</u>	1=One 2=Two 3=Three 4=Four
Labels Across.....	<u>1</u>	1=3 3/16" 2=3.5"
Label width.....	<u>1</u>	1=Mailsel 2=Catareq
Label Type.....	<u>1</u>	1-999
Nth Selection Fraction.....	<u>1</u>	1-999
Out of.....	<u>1</u>	1-999
Delete New Data After Printing..	<u>N</u>	Y/N
Is this a Re-print.....	<u>N</u>	Y/N
Print Labels.....	<u>Y</u>	Y/N
?Selection File for Mailing.....	DSP108S1	
Save for future "Omit Prv Usage"	<u>N</u>	Y/N
?Name of "Omit Prv Usage" File		
Print Labels to file in QGPL ...	<u>N</u>	Y/N
Name of File	WMLTAP001	
Clear File Before Save.....	<u>N</u>	Y/N
Send E-mail instead, if eligible	<u>Y</u>	Y/N
F1=Help F3=Exit F4=?List F12=Cancel		

Mail List Mailing panel (figure 8)

3. Press **Enter** to display the printer defaults panel, then make your selections and press **Enter** to generate the e-mails.