# **ORDER POWER!**

## E-mail Campaigns

User Guide Release 4.0.3



**Since 1978** 

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Version 4.0.3

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ORDER POWER! Cross-Sells

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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)

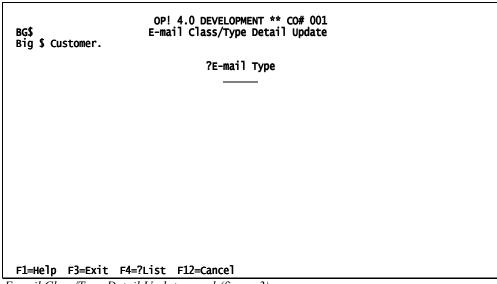
ORDER POWER! E-mail Campaigns

- 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
                        E-mail Class/Type Detail Inquiry
                                                                  Show Delete: N
Position to:
BG$
Big $ Customer.
2=Change 5=Display
E-mail Type Description
                                                               Del
                Credit Card - Order Cancelled
     CCC
     MARKET
                Marketing
                Order Was Shipped
     ORSHP
     PHOUT
                Phase Out
                                                                            Bottom
F1=Help F3=Exit F6=Create F7=Bkwd F8=Fwd
                                                F12=Cancel
```

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

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



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)*.

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	ELOPMENT ** CO# 001 /Type Detail Update r.
Send e-mail to the customer	<u>N</u> Y/N
Subject line for the e-mail Override User ID to send e-mail	Blank = Runtime User
Where is the document located If "I", what is the document name	_ I = In folder QDLS/OPEMAIL, A = AS/400
F1=Help F3=Exit F12=Cancel	Delete _

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

6. 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/OPEMAIL (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/OPEMAIL**.

7. 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)*.

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Doar Customer . We are pleased to appears that since you are among our best cus
Dear Customer, We are pleased to annouce that since you are among our best cus Tomers, we can offer you 25% off everything in stock on July 4. Happy Independ
Ence Day from your friends at CSI.
Lines Day 11 oill your 11 Tellus at CS1.

AS/4000 E-mail Message Entry panel (figure 5)

8. Type the text you want to use as the "Body" of this e-mail message, then press **Enter** to update the **E-mail Class/Type**.

#### Set up required in the Customer record

These things must be set correctly in the Customer record in order for a customer to receive **Marketing E-Mails**:

- The Customer's e-mail address must be available in the Customer record
- The Customer's E-Mail Class must be set up to receive Marketing E-Mails
- The Customer must not have requested to be excluded from Marketing E-Mails

#### To set up the Customer record

- 1. From the *ORDER POWER! Main Menu*, select: **Mail List Management** → **Work** with **Mailing List** to display the *Mail List Selection panel*.
- 2. Type the **Customer Number** in the **Customer Number** field, then press **Enter** to display the *Mail List Inquiry panel*, listing customers beginning with the number you entered.
- 3. Type **2** (Change) beside the **Customer** you want to work with, then press **Enter** to display *Mail List Update panel (figure 6)*.

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		MENT ** CO# 001	
	Mail List	Update	
Customer Number	9473	Tired Customer	
Name		er Search Last Name	
Position	Buyer	-	
Company		Search Company	
Address	6187 NW 167TH ST		
City, ?State	MIAMI ,	FL .	
Zip Code,?Country	33015 US	_	
Davti	mex Ext Evenir	ıqx Ext Fax	
Telephones 30	5-266-9800 5	•	
E-Mail Address	buyer@csiflorida.com		
?Demographic Code			
Abbreviation	AG NO PR NM CO TD 7	DE RN BR SP TS TS	PR
	EMP ?E-Mail Class AND		
?Added By	<del>_</del>	Original Media AWB	
Added	11/12/_8	?Name Type <u>0</u>	
?Label Request	DEB Printed N Y/N	?Prefer Ship Via _	
	Date ,	· · · · · ·	Delete
F1=Help F2=Unpro	tect F3=Exit F4=?List	F5=Bypass Group1 F9=Retrieve	F10=Add'Ī
F11=Ship Tos F12	=Cancel F13=Defaults	F14=Cust Notes F23=User	F24=More

Mail List Update panel (figure 6)

4. 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.

5. 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 Favor		mer	
Туре			Region ?Alert Class	BOZ		
?SIC Code			Discount	BUZ	A/P	
State Tax Exempt Country Tax Exemp					~,	
?Payment Terms	N30					
Credit Limit			?Billing Customer			
Late Charge		_ A/P	?Contact			
Statements	<u>N</u> Y/N		?Ship To Customer		_	
Backorders	Y Y/N		?Contact			
	<u>N</u> Y/N		Action Code			
	N Y/N		Action Date		=	
	<u>N</u> Y/N		Invoice By	N V/N		
Test Gender			Ship Segment	<u>N</u> Y/N <u>N</u> Y/N		
SS#			PO Required First Order Date	12/11/9	Q	
33T			i ii st viuei bate	12/11/30	U	
F1=Help F3=Exit	F4=?List	F12=Cancel	F14=Cust Notes	F23=User	F24=More	

Mail List Update panel (figure 7)

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

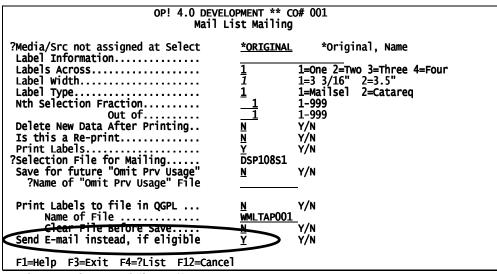
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#### Sending the E-mails

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**.



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.

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