

ORDER POWER!

E-mail Campaigns

**User Guide
Release 4.1**



Since 1978

6187 N.W. 167th Street, Unit H33
Miami Lakes, FL 33015
(305) 558-7000
helpdesk@csiflorida.com

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Computer Solutions, Inc. 1991-2005

ORDER POWER! Cross-Sell Groups

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Computer Solutions, Inc.

6187 NW 167 Street

Unit H33

Miami Lakes, Florida 33015 U.S.A.

Telephone: (305) 558-7000

Fax: (305) 557-0003

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E-mail Campaigns

An increasing number of organizations are moving from hardcopy to online newsletters to take advantage of benefits including lower cost, faster time to market and higher level of personalization and measurability.

With Release 4.1, you can use **ORDER POWER!** to send out formatted HTML email newsletters and other marketing communications including formatted text and graphics. Prior versions are restricted to plain text e-mail.

Setting up Marketing E-mails

The following things are required:

- Set up an **E-Mail Class** for **Marketing E-Mails** (*see below*)
- Set up the **Customer** record for receiving **Marketing E-Mails** (*see page 7*)
- Create the letter you want to send

Setting up an E-Mail Class for receiving Marketing E-Mails

An **ORDER POWER! E-Mail Class** is a collection of predefined messages that you want to send to customers who you have identified by adding a specific **E-Mail Class** code to their Mail List (customer) record in **ORDER POWER!**.

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

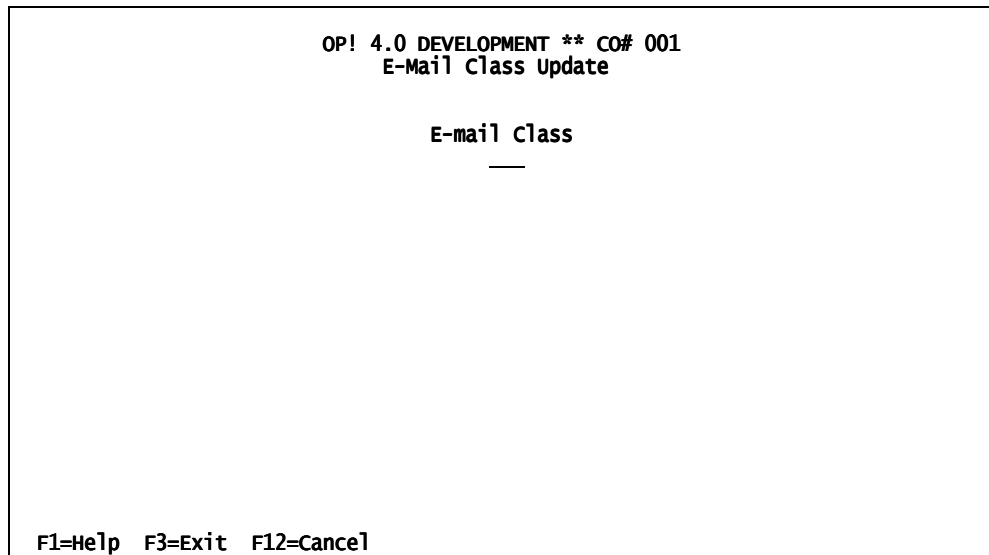
1. From the **ORDER POWER! Main Menu**, select: **Work with Files** → **E-mail Class Codes** to display the *E-mail Class Inquiry panel*.
2. Press **F6** (Create) to display the *E-Mail Class Update panel* (*figure 1*).

- 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*).



See "Setting up E-Mail for **ORDER POWER!** and the AS/400" User Guide for more information and instructions on setting up **E-mail Classes**.

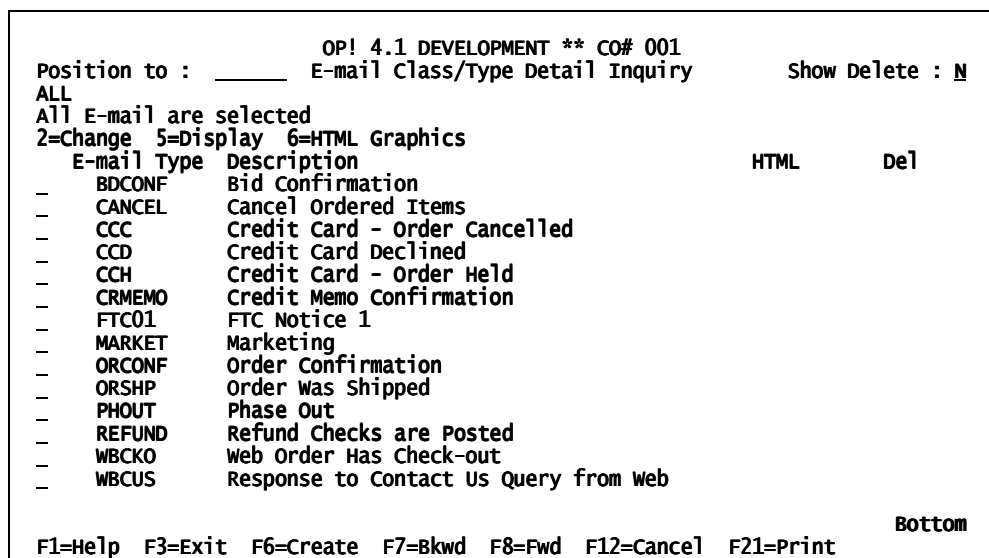


E-Mail Class Update panel (figure 1)

3. 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.
4. 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.

To create a Marketing E-mail for an E-mail Class

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



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

4. Press **F6** (Create) to display *E-mail Class/Type Detail Update panel 1* (figure 3).

```

OP! 4.0 DEVELOPMENT ** CO# 001
E-mail Class/Type Detail Update

BG$
Big $ Customer.

?E-mail Type
_____

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

```

E-mail Class/Type Detail Update panel 1 (figure 3)

5. In the **E-mail Type** field, type “MARKET,” then press **Enter** to display the *E-mail Class/Type Detail Update panel 2 (figure 4)*.

```

OP! 4.1 DEVELOPMENT ** CO# 001
E-mail Class/Type Detail Update
E-mail Class EML new html email class
E-mail Type MARKET Marketing

Send e-mail to the customer Y
Subject line for the e-mail This week only! Sale on shoes
Override User Name to send e-mail Blank = Runtime User
Where is the document located I I = In folder QDLS/PEMAIL, A = AS/400
If "I": what is the document name SHOEMAIL.TXT Send HTML E-mail Y Y/N

Delete _

F1=Help F3=Exit F12=Cancel

```

E-mail Class/Type Detail Update panel 2 (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/PEMAIL (see below)

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

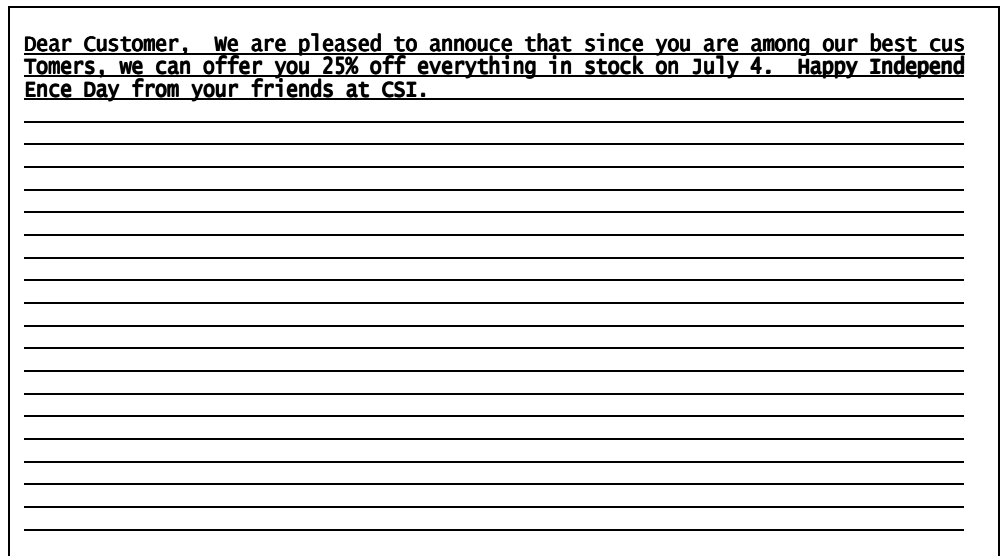
If "I", what is the document name

If you are storing the body of the message in your IFS (see the previous field), type the name of the document you want to use for the “Body” of this e-mail message. This document name **MUST** be in the *filename.txt* (old MS-DOS, no longer than 8.3 characters) format, and stored in your IFS **QDLS/PEMAIL** folder.

Send HTML E-mail

Type **Y**(es) or **N**(o) to indicate whether or not you want to send an HTML formatted (instead of plain text) e-mail.

- 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).



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**. You can enter HTML text if you have entered **Y**(es) in the **Send HTML E-mail** field on the previous panel. See “Including Images in HTML e-mail” on page 6 about using images in your e-mails.

Overriding the Customers’ E-mail Classes using a Media

If you want to send out a specific email to a group of customers, regardless of their **E-mail Class**, you can use a Media for this purpose. These directions assume the user is already familiar with the **Media** function in the **Work with Files** menu.

To create a Marketing E-mail for a Media

- 1. From the **ORDER POWER! Main Menu**, select: **Work with Files**→**Media** to display the *Media Inquiry panel*.

- Type **2** (Change) beside the **Media** you want to work with, then press **Enter** twice to display *Media Update panel 2* (figure 6).

```

OP! 4.1 DEVELOPMENT ** CO# 001
Media Update

Media Code
REPPETS
Description Media for Marketing emails

?Shipping/Handling Calculation Method - Chart Id
?Alternate Method - Chart Id
Add-On Charge - Amt/Pct

?Response Curve - Projected Order $
Projected Orders
Unattributable Pct - Forecast Modification Period
OE Auto Display Items - Y/N Show only available items - Y/N
Is this a Daily Special Media Y/N
Limit Daily Specials to previously ordered Product Groups - Y/N
Up sell Message
Override MARKETing E-Mail Document (in folder QDLS/PEMAIL)
Purged Order $ Send HTML E-mail - Y/N
Purged Orders Purged Names
Purged Cr Memo $ Purged Buyer $
Purged Cr Memos Purged Buyers
F1=Help F3=Exit F4=?List F12=Cancel

```

Media Update panel 2 (figure 6)

- Complete these fields:

Override MARKETing E-Mail Document

Type the name of the document you want to use for the “Body” of this e-mail message. This document name **MUST** be in the *filename.txt* (old MS-DOS, no longer than 8.3 characters) format, and stored in your IFS **QDLS/PEMAIL** folder.

Send HTML E-mail

Type **Y**(es) or **N**(o) to indicate whether or not you want to send an HTML formatted (instead of plain text) e-mail.

- Press **Enter** to update the **Media**.
- You may need to specify where your image files are stored on your IFS if you are attaching images (rather than linking to an image on a webserver). See “Including Images in HTML e-mail” on page 6 about using images in your e-mails if you have images in your message.
- When you are running the **Select for Mailing** option to send the e-mails, you must specify the **Media** you have selected. See instructions regarding the **Assign Media or Source Code** field on page 11 for more information about this.

Creating the E-mail content

This section explains the various options available for creation and storing your messages. **ORDER POWER!** e-mails can be associated with either an **E-mail Class/Type** or a **Media**.

Plain text vs. HTML

If you are wondering whether it is better to send e-mail as HTML or as plain text, here are some of the pros and cons of using HTML formatted e-mail:

HTML	Plain Text
HTML e-mail messages can have attractive and interesting displays and catch the reader's attention much better than plain text e-mail.	HTML e-mail uses more bandwidth than plain text. It takes longer to download and takes up more disk space.
HTML e-mail can contain most of the layout and formatting of web pages, including formatted text, named links, and embedded images.	Not all recipients enable their e-mail program to read HTML e-mail because of privacy and virus concerns.

Including Images in HTML e-mail

There are two ways to include images in HTML e-mail.

- **Method 1**
Include the images as file attachments with the message. In your HTML, use a Content-ID header in IMG tags, using **cid URLs** such as ``.
- **Method 2**
Include references to images on the Web. In your HTML, use the images' URLs within IMG tags such as ``.

Your webmaster should decide on which method is best suited to your customers and your web server's load capacity.

To attach images in a Class/Type E-mail

This process specifies the image files to be attached with an HTML e-mail when you use the "cid" URL described above as **Method 1**. It is not necessary if you are linking to images stored on a webserver and explicitly specifying the URL described above as **Method 2**.

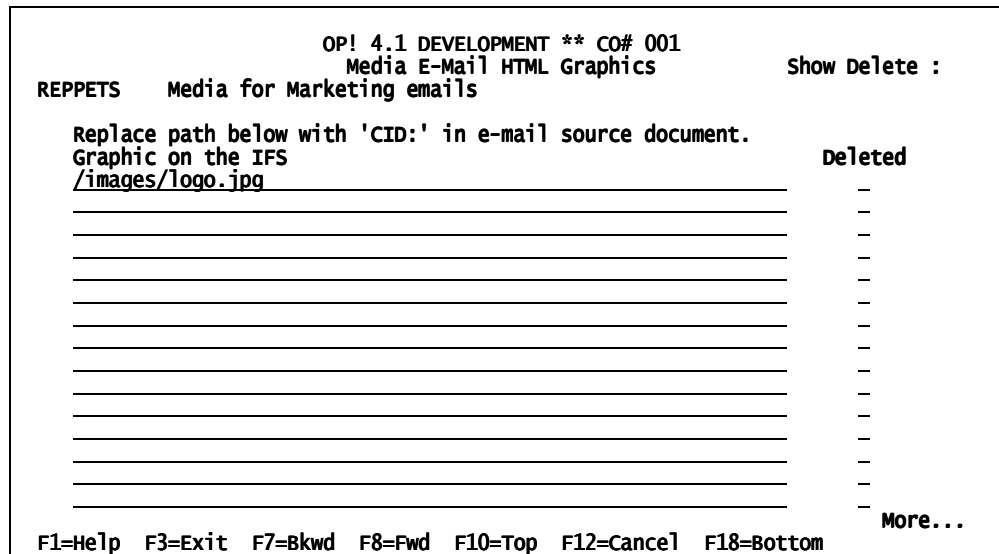
1. From the **ORDER POWER! Main Menu**, select: **Work with Files** → **E-mail Class Codes** to display the *E-mail Class Inquiry panel*.
2. Type **6** (Class/Type Details) beside an **E-mail Class** you want to work with, then press **Enter** to display *E-mail Class/Type Detail Inquiry panel (figure 2)*.
3. Type **6** (HTML Graphics) beside the **MARKETING Class/Type**, then press **Enter** to display *Marketing E-Mail Type HTML Graphics Inquiry panel*.
4. Press **F6** (Create) to display the *Marketing E-Mail Type HTML Graphics panel*, similar to *Media E-Mail HTML Graphics panel (figure 7)*.

- For each images referenced in the HTML message, type its full path and name relative to the root directory of your website. Be sure to replace path you enter with **CID:** in e-mail source document.

To attach images in a Media E-mail

This process specifies the image files to be attached with an HTML e-mail when you use the “cid” URL described above as **Method 1**. It is not necessary if you are linking to images stored on a webserver and explicitly specifying the URL described above as **Method 2**.

- From the **ORDER POWER! Main Menu**, select: **Work with Files** → **Media** to display the *Media Inquiry panel*.
- Type **12** (HTML Graphics) beside the **Media** you want to work with, then press **Enter** to display the *Media E-Mail HTML Graphics Inquiry panel*.
- Press **F6** (Create) to display *Media E-Mail HTML Graphics panel* (figure 7).



Media E-Mail HTML Graphics panel (figure 7)

- For each images referenced in the HTML message, type its full path and name relative to the root directory of your website. Be sure to replace path you enter with **CID:** in e-mail source document.

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

- 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 8).

```

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

Customer Number  _473      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- 800 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 F=Retrieve F10=Add'l
F11=Ship Tos F12=Cancel F13=Defaults F14=Cust Notes F23=User F24=More
  
```

Mail List Update panel (figure 8)

4. Complete these fields:

E-Mail Address

Type the Customer's E-Mail Address.

E-Mail Class

Type the Customer's E-Mail Class code. **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 9).

```

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

Customer Number  _473      Name CSI's Favorite Customer
                                Happy Customer
Type             _____ Region
?Alert Class     _____ ?Alert Class
Discount        _____ Discount _____ A/P
?SIC Code        _____
State Tax Exempt ID _____
Country Tax Exempt ID _____
?Payment Terms   N30
Credit Limit     _____
Late Charge      _____ - A/P
Statements       N Y/N
Backorders       Y Y/N
Exclusion: Mail   N Y/N
                Sell N Y/N
                Email N Y/N
?Billing Customer _____
?Contact         _____
?Ship To Customer _____
?Contact         _____
Action Code      _____
Action Date      _____
Invoice By       _____
Ship Segment     N Y/N
PO Required      N Y/N
First Order Date 12/11/_8

F1=Help F3=Exit F4=?List F12=Cancel F14=Cust Notes F23=User F24=More
  
```

Mail List Update panel (figure 9)

6. 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 panel 1* (figure 10).

```

OPI 4.1 DEVELOPMENT ** CO# 001
Mail List Mailing Selection

Last Order Date: From ..... _____
                  To ..... _____
Creation Date: From ..... _____
                  To ..... _____
Amt Order Date: From ..... _____
                  To ..... _____
Amount Ordered: From ..... _____
                  To ..... _____
Contacts ..... -
Exclusion: Mail ..... -
          Sell ..... -
          Email ..... -
Deleted ..... -
Name Type ..... -
Customer Class ..... -
Customer Type ..... -
Customer Region ..... -

1=Include  2=Omit  3=Only
1=Include  2=Omit  3=Only
1=Include  2=Omit  3=Only
1=Include  2=Omit  3=Only
1=Include  2=Omit  3=Only
1=All      2=I      3=O      4=S
5=I&O     6=I&S    7=O&S
1=All      2=Include 3=Exclude
1=All      2=Include 3=Exclude
1=All      2=Include 3=Exclude

F1=Help  F3=Exit  F12=Cancel

```

Mail List Mailing Selection panel 1 (figure 10)

2. In the **Email Exclusion** field, type a code to specify customer preference for receiving email:
 - 1=Include** selects all customers who fit all your other selected criteria. *This setting disregards the customer's stated preference.*
 - 2=Omit** omits customers who do not want to receive Email.
 - 3=Only** selects **only customers who do not want** to receive Email. *This setting disregards the customer's stated preference.*
3. Complete the other selections as you see fit, press **Enter** to display *Mail List Mailing Selection panel 2* (figure 11).

```

OP! 4.1 DEVELOPMENT ** CO# 001
Mail List Mailing Selection

SIC Code ..... - 1=All 2=Include 3=Exclude
Label Request ..... - 1=All 2=Include 3=Exclude
Blank Labels Request Codes.... - 1=Include 2=Omit
Tender ..... - 1=All 2=Include 3=Exclude
Original Media ..... - 1=All 2=Include 3=Exclude
Demographics Codes ..... - 1=All 2=Select
Country ..... - 1=All 2=Include 3=Exclude
State ..... - 1=All 2=Include 3=Exclude
Zip Code ..... - 1=All 2=Include 3=Range
Product Group ..... - 1=All 2=Include 3=Exclude
Item ..... - 1=All 2=Include 3=Exclude
Prod Group/Item select within
  Amt Order Date range only .. - Y/N
SCF Code ..... - 1=All 2=Include 3=Range
Prior Mailed Media ..... - 1=All 2=Include 3=Exclude
Frequency ..... - 1=All 2=Select
RFM Scoring ..... - 1=All 2=Include 3=Range
?Assign Media or Source Code... _____ Character value

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

```

Mail List Mailing Selection panel 2 (figure 11)

- In the **Assign Media or Source Code** field, you can type a **Media** code if you want to send the document specified in that Media, rather than in each customer's Email Class (see "Overriding the Customers' E-mail Classes using a Media" on page 4 for instructions on how to do this).
- Complete the selections as you see fit, press **Enter** after each panel. On the *Mail List Mailing panel (figure 12)*, 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
Label Information..... *ORIGINAL *Original, Name
Labels Across..... 1 1=One 2=Two 3=Three 4=Four
Label Width..... 1 1=3 3/16" 2=3.5"
Label Type..... 1 1=Mailse1 2=Catareq
Nth Selection Fraction..... 1 1-
  Out of..... 1 1-
Delete New Data After Printing.. N Y/N
Is this a Re-print..... N Y/N
Print Labels..... Y Y/N
?Selection File for Mailing..... DSP108S1
Save for future "Omit Prv Usage"
  ?Name of "Omit Prv Usage" File _____
Print Labels to file in QGPL ... N Y/N
  Name of File ..... WMLTAP001
Clear File before Save..... N Y/N
Send E-mail instead, if eligible Y Y/N

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

```

Mail List Mailing panel (figure 12)

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

