

## Chapter 14

# Creating a Marketing Campaign

FrontDesk v4.1.25

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## Customer Marketing and Promotion

Open “Customer Marketing & Promotion” by selecting “FrontDesk” ➤ “Customer Manager” ➤ “Marketing and Promotion”. You may also do this from the “Point-of-Sale” (POS) application. The “Customer Marketing and Promotion” window will be displayed.

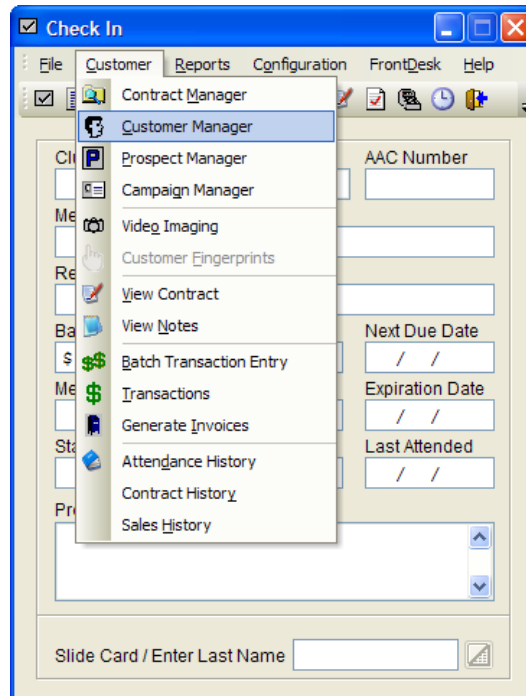


Figure 14-1.

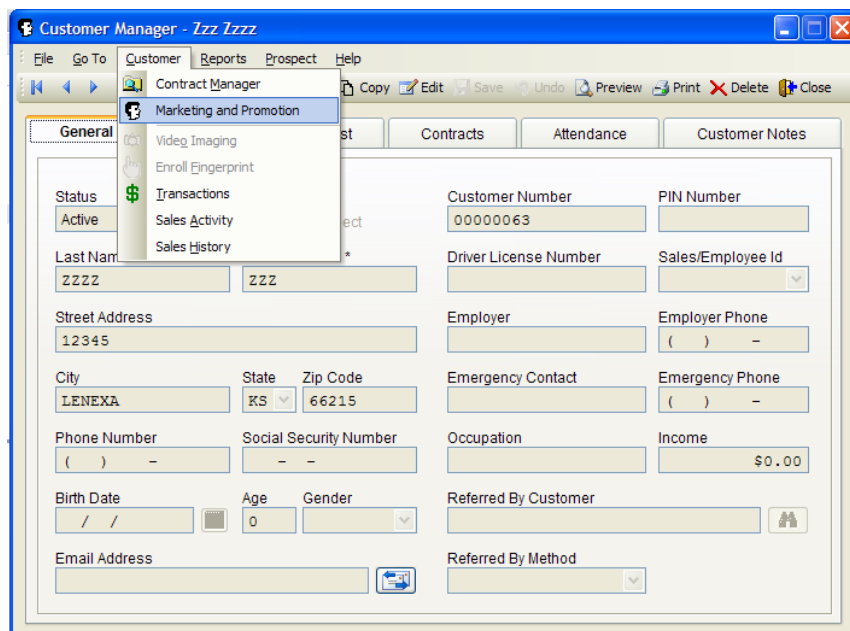


Figure 14-2.



The "Customer Marketing and Promotion" Window is where you will create your marketing and promotions campaigns. This is easily accomplished through the tasks menu.

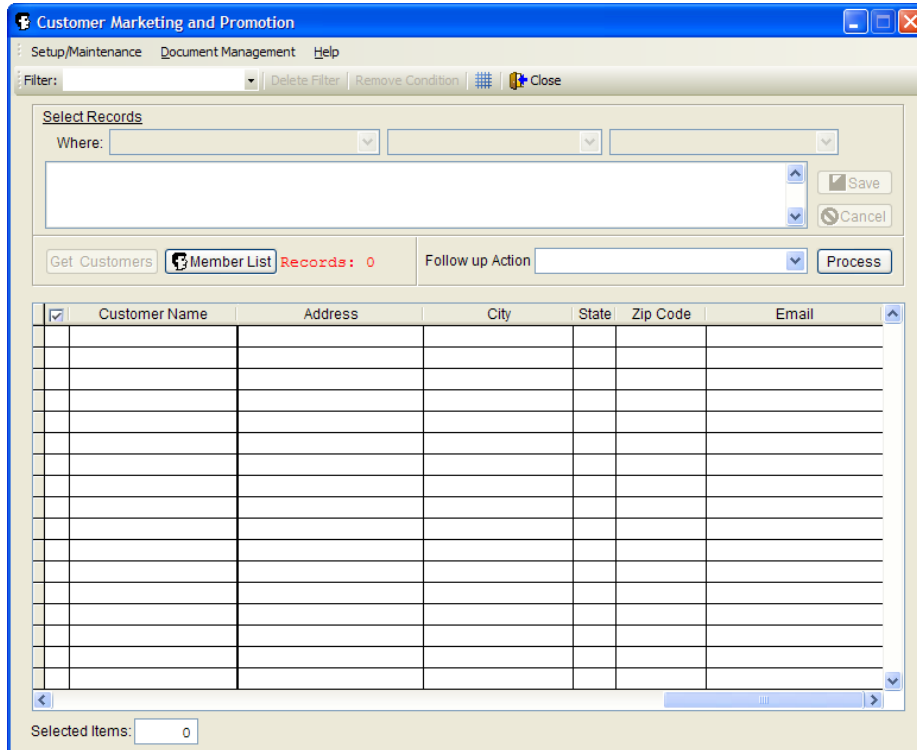


Figure 14-3.



## Marketing and Promotion Tasks Menu

### Setup/Maintenance:

The Email Configuration option will need to be set to an email address you plan to send your emails from and the default subject line.

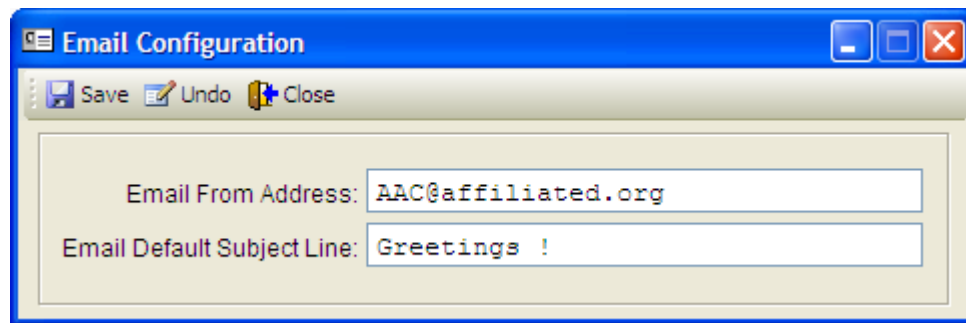


Figure 14-4.

### Document Management:

**Merge Fields:** Opens a list of available fields that may be added to your document.

**Add a New Document:** Enter the document name you would like to use and how the document will be sent to your members.

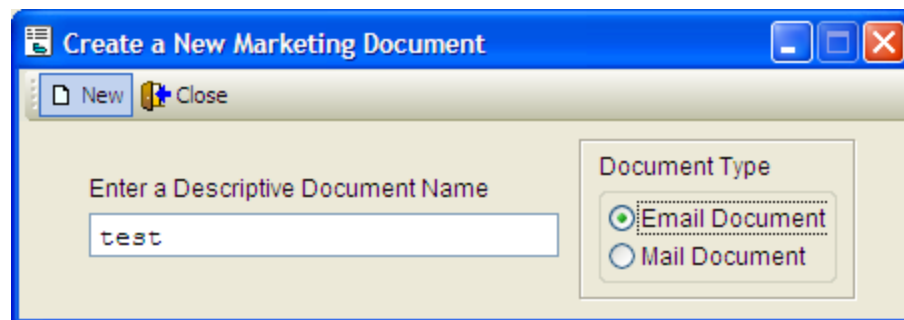


Figure 14-5.

**Edit/Delete a Document:** Use this option to edit or delete a document you have created but no longer want to use.

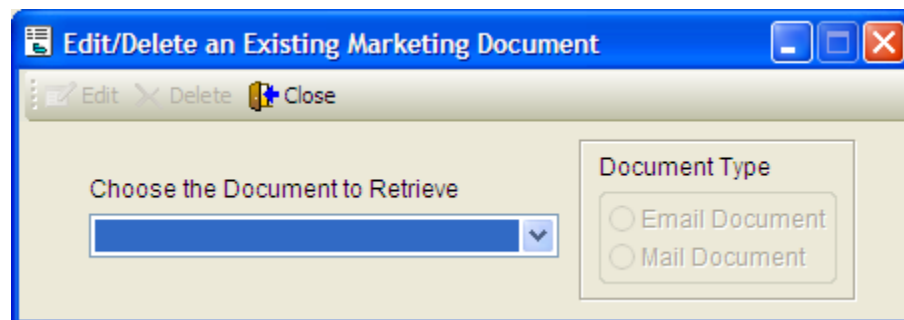


Figure 14-6.



**Import an External Letter:** Imports a word document to be used as a letter

**Import an External Email:** Imports a word document to be used as an email

## Add a Marketing Document

The first step in creating a Marketing or Promotional Campaign is to create your document. From “Customer Marketing and Promotion”, select “**Document Management**” then “**Create a New Document**”, as shown in Figure 14-7.

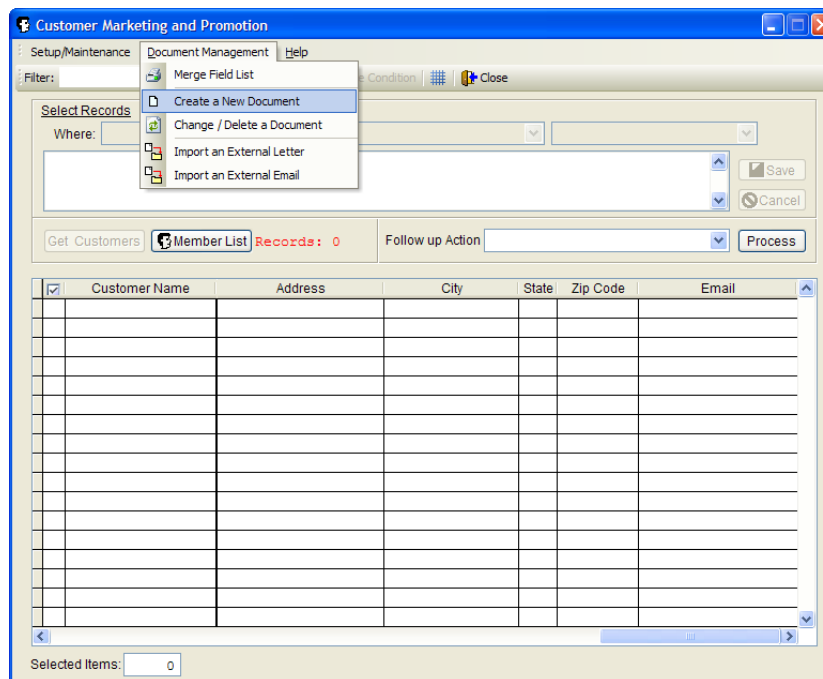


Figure 14-7.

At the Create a New Document window, give the document a descriptive name and press enter. Once you press enter, you will be able to select the document type (email or mail document).

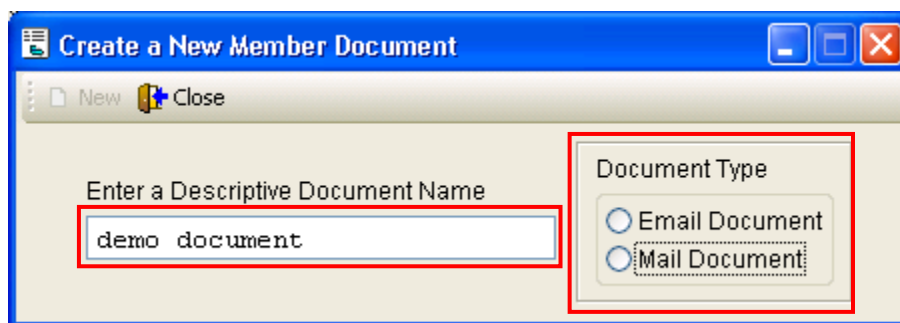


Figure 14-8.



After naming the document and selecting the document type, click the **“New”** button. You may see the message below. Click **“Yes”** and an email merge template will open. If the document is a mail document a MS-word merge template will open.

## Sample Email Merge Template

Insert the desired text for the email or mail campaign and save it. When saving use all default settings. You will be returned to the Create a New Document Window. Click the **“Close”** button.

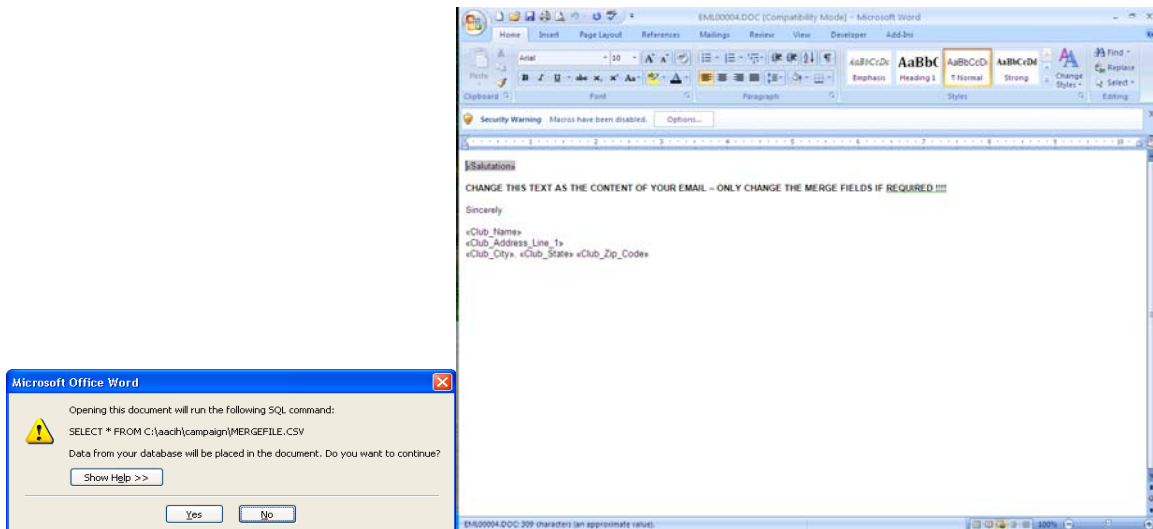


Figure 14-9.



## Sample MS-Word Merge Template

Insert the desired text for the email or mail campaign and save it. When saving use all default settings. You will be returned to the Create a New Document Window. Click the **“Close”** button.

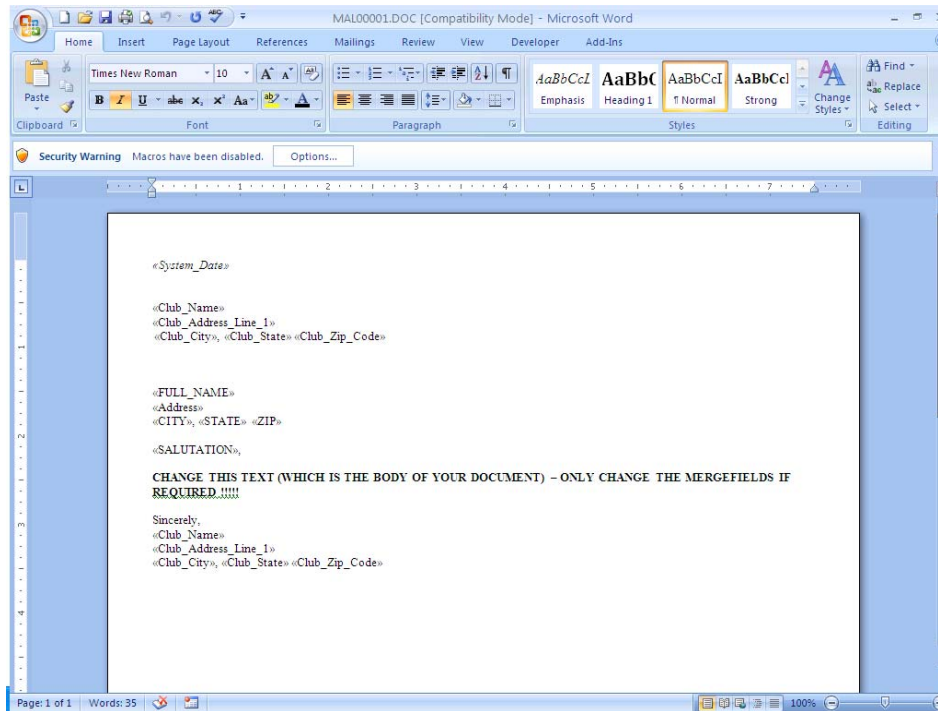


Figure 14-10.

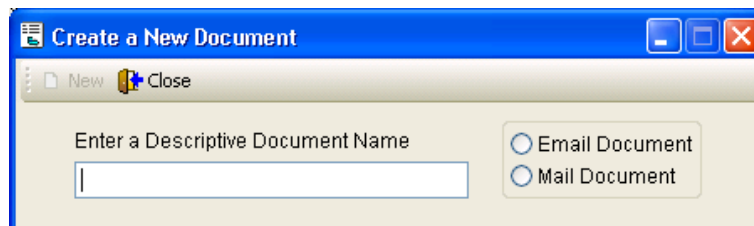


Figure 14-11.

## Create a Filter

The next step is creating a filter for selection criteria. From the “Customer Marketing and Promotion” window click in the **“Filter”** Box and type a name for the filter you would like to use then hit the **“Enter”** key. Under the “Select Records” area set the where options. Then click **“Save”**. Now you should see the filter in the drop down list that we just created.

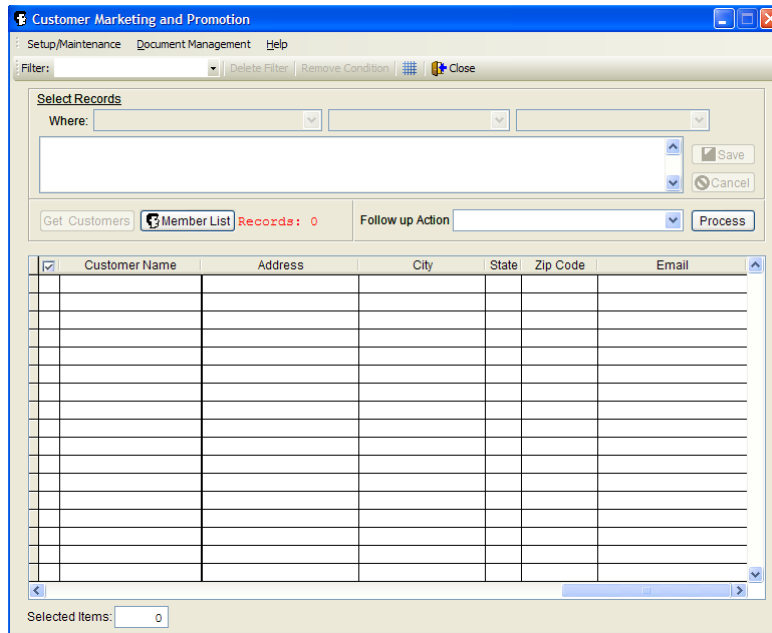


Figure 14-12.

## Run the Filter

Running the filter will retrieve a list of customers / members based on the selection criteria you established when creating the filter. To run a filter from Checkin or POS, select the FrontDesk Menu and click on Customer Marketing & Promotion. From the Customer Marketing & Promotion window, click the down arrow under Filter Customers and select the desired filter. Click the Get Customers button.

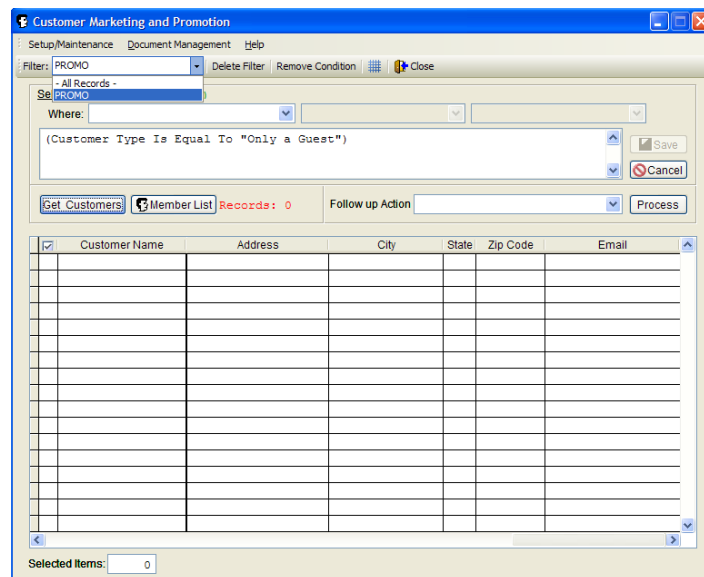


Figure 14-13.



Under the follow up action prompt box, click the down arrow and select the desired follow up action. In the grid, review the list of customers. If you don't want a customer to receive the email or mail document remove the check mark at the left of the screen for that person's name. After reviewing the list of customers, click the **"Process"** button.

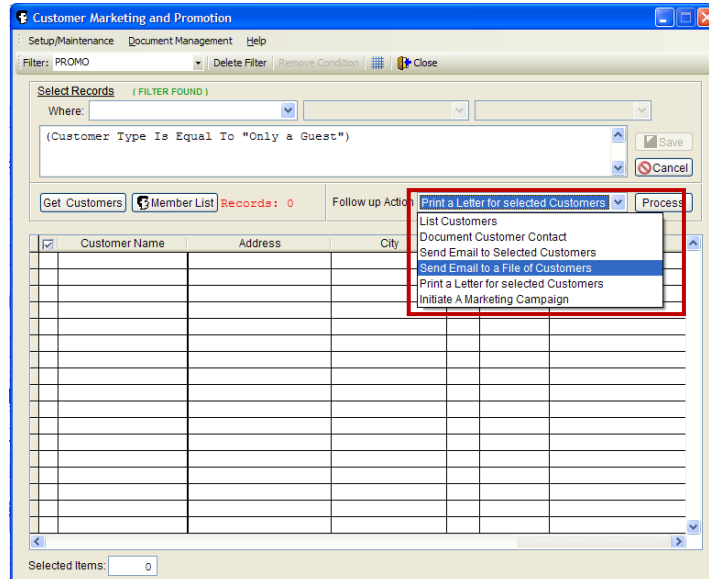


Figure 14-14.

Choose what document to print and click the **"Print Letters"** button. If you are printing a letter the "Subject" option will be grayed out and unable to be changed, but if you are sending an email then you will be able to change the "Subject" line.

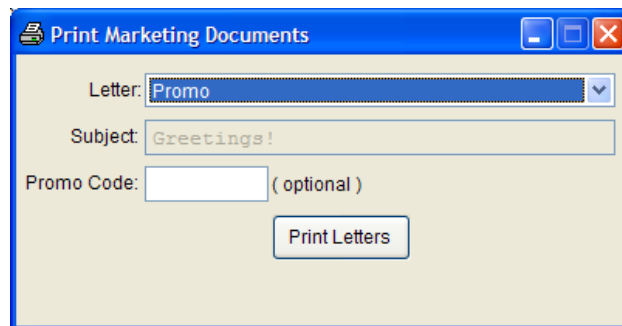


Figure 14-15.

Select the printer you want to use and click **"OK"**. The merge will run and then the documents will print or go out in email. This takes a few minutes...please be patient.

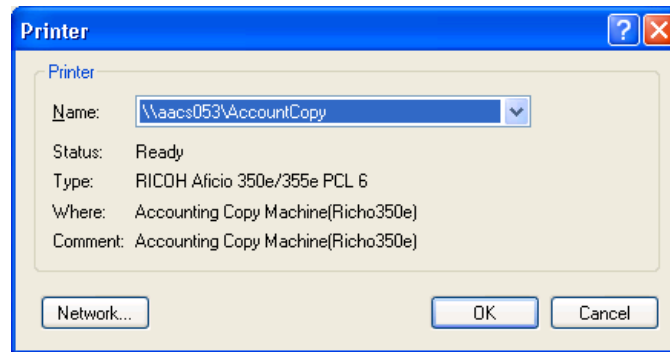


Figure 14-16.