



# Portal User Guide

**Marketing**

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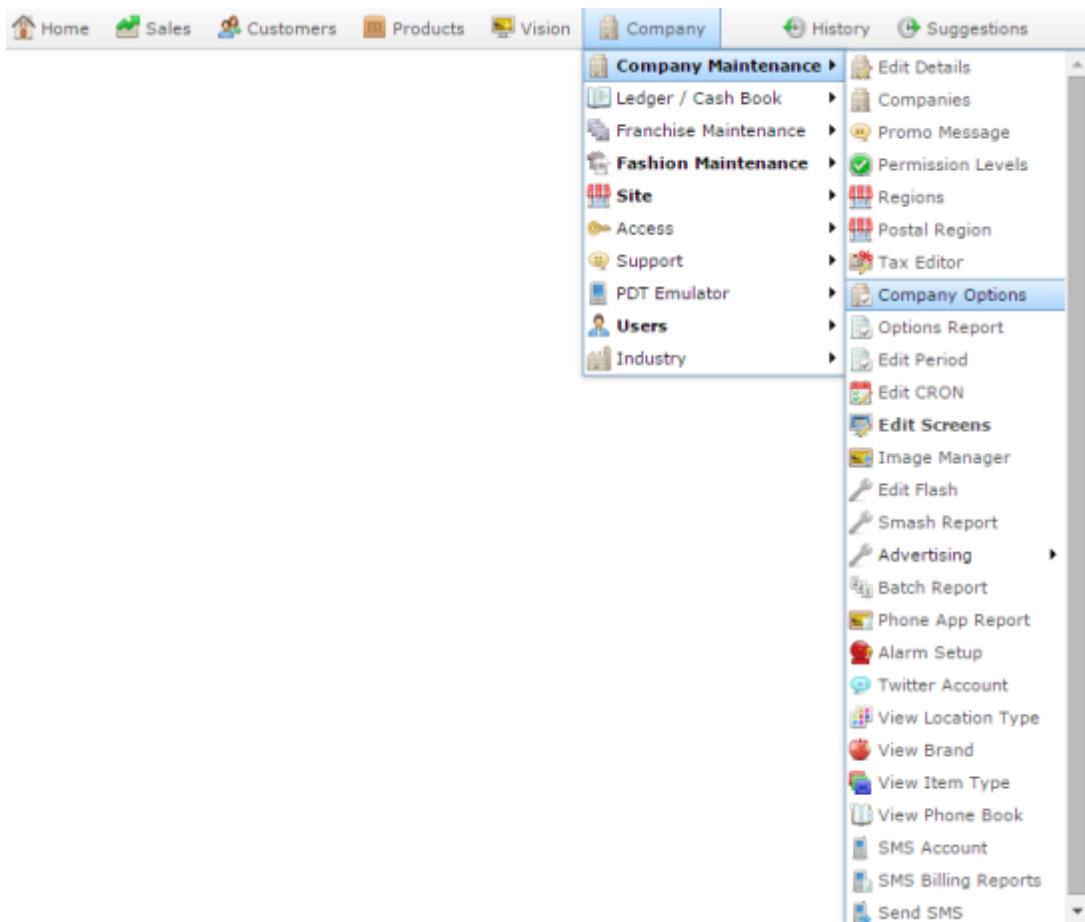
## Configuring your company for marketing

Use the Company Options - Marketing section to configure your company for marketing activities.

### Opening the Company Options - Marketing section

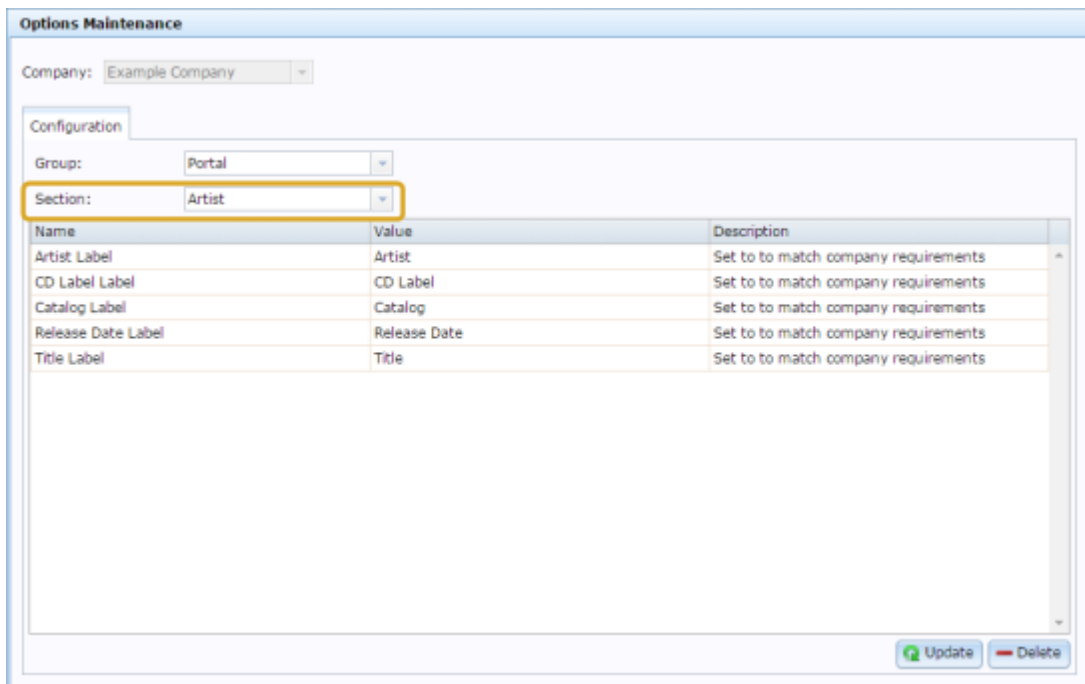
To open the Company Options - Marketing section:

1. Press  Company.
2. Press Company Maintenance > Company Options.



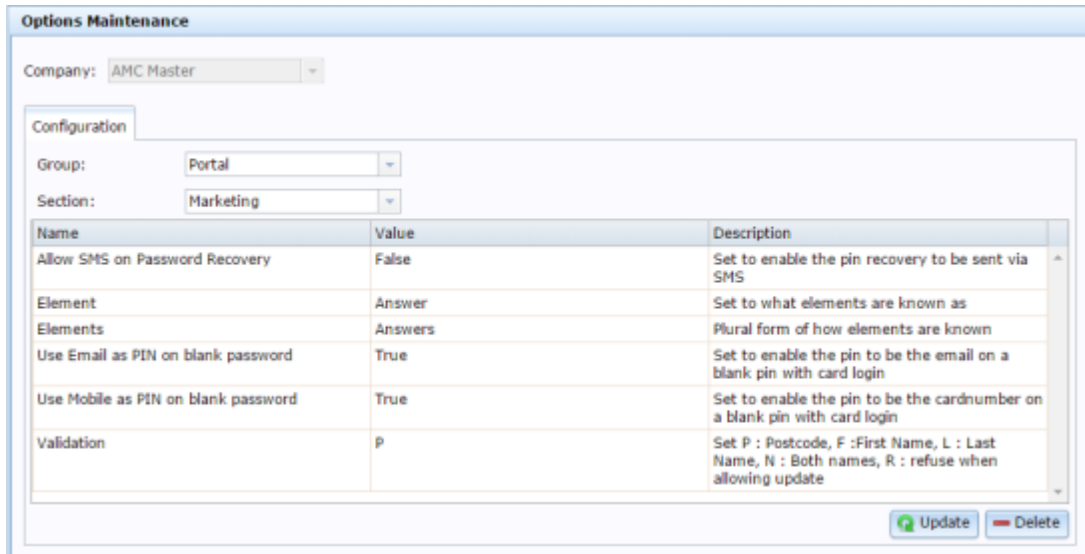
The Artist section of the Company Options screen is displayed.

3. Open the [Section](#) drop-down list.



4. Press Marketing from the Section drop-down list.  
The Marketing section is displayed.

IMAGE



## Company Options - Marketing section key fields and buttons

Field	Description
<b>Allow SMS on Password Recovery</b>	Type <b>True</b> to allow customers to recover their PIN via SMS message.
<b>Element</b>	Define the term used in the Portal for a marketing element.
<b>Elements</b>	Define the plural term used in the Portal for marketing elements.
<b>Use Email as PIN on blank password</b>	Type <b>True</b> to allow the member's email address to be used as the PIN with a blank password.
<b>Use Mobile as PIN on blank password</b>	Type <b>True</b> to allow the member's mobile number to be used as the PIN with a blank password.

Field	Description												
<b>Validation</b>	<p>Select what information is used to validate updates to the member's information:</p> <table border="1"> <thead> <tr> <th data-bbox="938 568 1007 595">Type</th> <th data-bbox="1043 568 1155 595">To use...</th> </tr> </thead> <tbody> <tr> <td data-bbox="938 672 954 698"><b>P</b></td> <td data-bbox="1043 672 1326 698">Customer's post code.</td> </tr> <tr> <td data-bbox="938 775 954 801"><b>F</b></td> <td data-bbox="1043 775 1334 801">Customer's first name.</td> </tr> <tr> <td data-bbox="938 878 954 904"><b>L</b></td> <td data-bbox="1043 878 1326 904">Customer's last name.</td> </tr> <tr> <td data-bbox="938 981 954 1008"><b>N</b></td> <td data-bbox="1043 981 1358 1043">Customer's first and last name.</td> </tr> <tr> <td data-bbox="938 1120 954 1146"><b>R</b></td> <td data-bbox="1043 1120 1275 1146">Disallow updates.</td> </tr> </tbody> </table>	Type	To use...	<b>P</b>	Customer's post code.	<b>F</b>	Customer's first name.	<b>L</b>	Customer's last name.	<b>N</b>	Customer's first and last name.	<b>R</b>	Disallow updates.
Type	To use...												
<b>P</b>	Customer's post code.												
<b>F</b>	Customer's first name.												
<b>L</b>	Customer's last name.												
<b>N</b>	Customer's first and last name.												
<b>R</b>	Disallow updates.												

## Configuring your company for marketing information

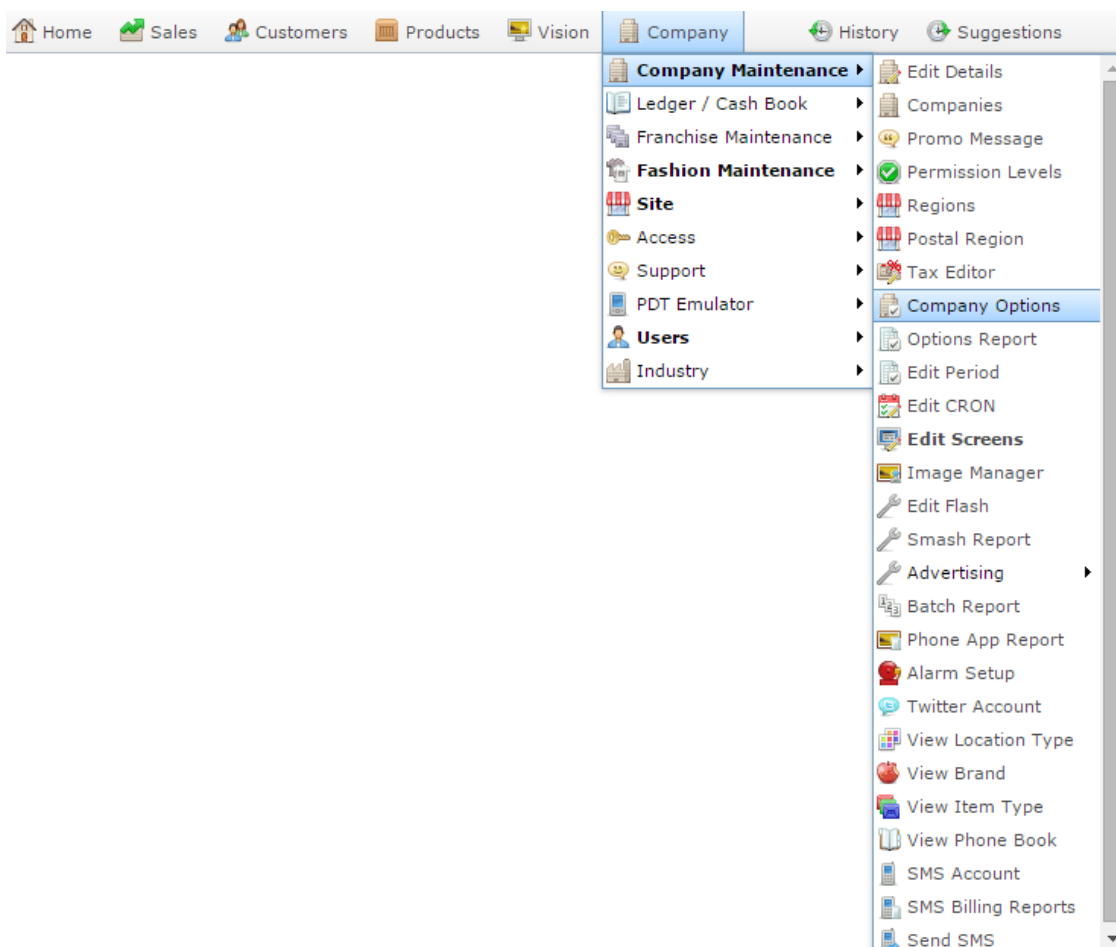
Use the Company Options - Marketing Compulsory section to configure what information the Portal configures compulsory for marketing customers.

**Note:** There are several sections for configuring marketing within your company. Also see: *Configuring your company for marketing* on page 4, *Configuring your company for marketing emails* on page 12, and *Configuring your company for marketing events* on page 17.

## Opening the Company Options - Marketing Compulsory section

To open the Company Options - Marketing Compulsory section:

1. Press  Company.
2. Press Company Maintenance > Company Options.



The Artist section of the Company Options screen is displayed.



- Open the Section drop-down list.

**Options Maintenance**

Company: Example Company

Configuration

Group: Portal

Section: Artist

Name	Value	Description
Artist Label	Artist	Set to to match company requirements
CD Label Label	CD Label	Set to to match company requirements
Catalog Label	Catalog	Set to to match company requirements
Release Date Label	Release Date	Set to to match company requirements
Title Label	Title	Set to to match company requirements

Update Delete

- Press Marketing Compulsory from the Section drop-down list.

The Marketing Compulsory section is displayed.

**Options Maintenance**

Company: AMC Master

Configuration

Group: Portal

Section: Marketing Compulsory

Name	Value	Description
Address	False	Set if Compulsory
DateOfBirth	False	Set if Compulsory
Either	False	Set if either Email or Mobile Compulsory
First Name	True	Set if Compulsory
Gender	False	Set if Compulsory
Home Phone	False	Set if Compulsory
Ignore	False	Set to allow Portal edit to ignore Compulsory flags
Last Name	True	Set if Compulsory
Mobile Phone	False	Set if Compulsory
Postcode	False	Set if Compulsory
State	False	Set if Compulsory
Suburb	False	Set if Compulsory
Work Phone	False	Set if Compulsory
email	Email	Set if Compulsory

Update Delete

## Company Options - Marketing Compulsory section key fields and buttons

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Field	Description
<b>Address</b>	Type <b>True</b> if the marketing member's address must be completed.
<b>Date of Birth</b>	Type <b>True</b> if the marketing member's date of birth must be completed.
<b>Either</b>	Type <b>True</b> if either the marketing member's email or mobile number must be completed.
<b>First Name</b>	Type <b>True</b> if the marketing member's first name must be completed.
<b>Gender</b>	Type <b>True</b> if the marketing member's gender must be completed.
<b>Home Phone</b>	Type <b>True</b> if the marketing member's home phone number must be completed.

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Field	Description
<b>Ignore</b>	Type <b>True</b> if Portal operators can ignore compulsory fields when they edit marketing records through the Portal, for example edit a marketing member and delete an incorrect address, even though the address field is compulsory.
<b>Last Name</b>	Type <b>True</b> if the marketing member's last name must be completed.
<b>Mobile Phone</b>	Type <b>True</b> if the marketing member's mobile phone number must be completed.
<b>Postcode</b>	Type <b>True</b> if the marketing member's post code must be completed.
<b>State</b>	Type <b>True</b> if the marketing member's state must be completed.
<b>Suburb</b>	Type <b>True</b> if the marketing member's suburb must be completed.
<b>Work Phone</b>	Type <b>True</b> if the marketing member's work phone number must be completed.
<b>Email</b>	Type <b>True</b> if the marketing member's email must be completed.

## Configuring your company for marketing emails

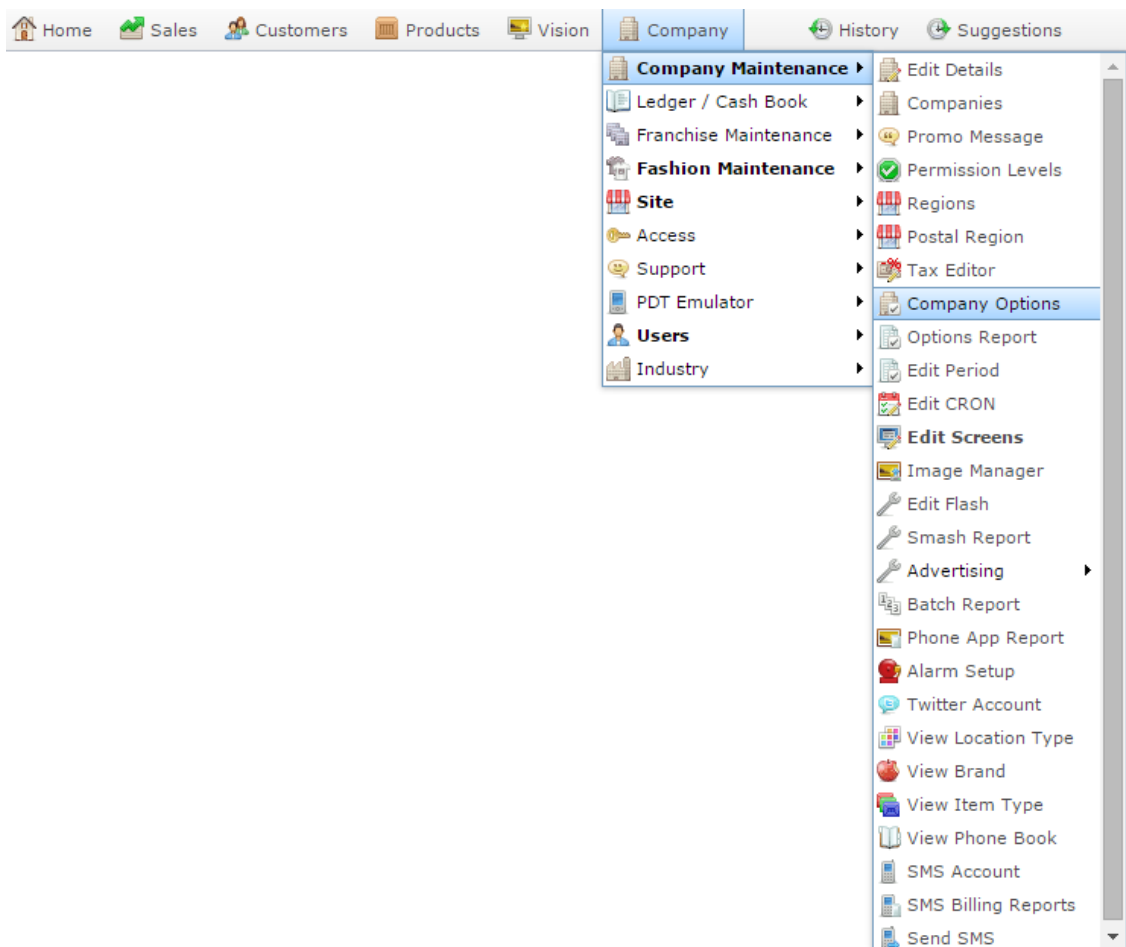
Use the Company Options - Marketing Email section to configure your company for customer marketing emails.

**Note:** There are several sections for configuring marketing within your company. Also see: *Configuring your company for marketing* on page 4, *Configuring your company for marketing information* on page 8, and *Configuring your company for marketing events* on page 17.

## Opening the Company Options - Marketing Email section

To open the Company Options - Marketing Email section:

1. Press  Company.
2. Press Company Maintenance > Company Options.



The Artist section of the Company Options screen is displayed.

3. Open the Section drop-down list.

Options Maintenance

Company: Example Company

Configuration

Group: Portal

Section: Artist

Name	Value	Description
Artist Label	Artist	Set to to match company requirements
CD Label Label	CD Label	Set to to match company requirements
Catalog Label	Catalog	Set to to match company requirements
Release Date Label	Release Date	Set to to match company requirements
Title Label	Title	Set to to match company requirements

Update Delete

4. Press Marketing Email from the Section drop-down list.

The Marketing Email section is displayed.

Managing marketing and surveys

**Options Maintenance**

Company:

**Configuration**

Group:

Section:

Name	Value	Description
Confirm	Click Here to Confirm Email	Set message for email confirmation
ConfirmReading		Set URL for Confirmed Reading, leave blank for portal default
Enable SpamAssassin	True	Set to True to enable Spam Assassin evaluation of email
Forward Default Message	I've just received this email and thought you might find it interesting	Set Default message when forwarding on to a friend
Forward Message		Set Set message for forwarding on to a friend
From	QA Market Portal	Set to 'From' where customer sees email is from
Login	Click to Login to update your details	Set Default message for Login action
Lost	Click here for password recovery	Set message for password recovery
Lost URL		Set URL for lost password recovery, leave blank for portal default
Opt Out	Click here to opt out	Set message for Opt Out
Opt Out URL		Set URL for Opt Out, set blank for portal default
Reply Address	support@zenglobal.net	Set to address where Client replies to, leave blank for portal default
Return Address	support@zenglobal.net	Set to address where eMail Server messages return to, leave blank for portal default
Text	To view this email on line go to	Set message to be viewd by text only clients, linked to View Email online
View	Having troubles reading, Click here	Set message to view online

## Company Options - Marketing Email section key fields and buttons

Field	Description
<b>Confirm</b>	Type the message to be displayed for confirmation links in emails.
<b>ConfirmReading</b>	Type the URL the confirmation link leads to, or leave blank to use the Portal default.
<b>Enable SpamAssassin</b>	Type <b>True</b> to enable SpamAssassin email evaluation to ensure your email won't be automatically marked as spam.
<b>Forward Default Message</b>	Type the message to be displayed by default when marketing messages are forwarded.
<b>Forward Message</b>	Type the link to display that helps customers forward the email to a friend.
<b>From</b>	Type the name the email appears to be from.
<b>Login</b>	Type the message to display for login links.
<b>Lost</b>	Type the message to be displayed for recovering passwords.

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<b>Field</b>	<b>Description</b>
<b>Lost URL</b>	Type the URL link for customers to recover their login password. Leave blank to use the Portal default.
<b>Opt In</b>	Type the message to display for opt-in links.
<b>Opt Out</b>	Type the message to display for opt-out links.
<b>Out Out URL</b>	Type the URL for customers to opt-out of further emails, or leave blank to use the Portal default.
<b>Reply Address</b>	Type the email address to send customer's replies to marketing emails to.
<b>Return Address</b>	Type the email address to sent email server messages to, for example regarding emails that failed to send.
<b>Text</b>	Type the message to be displayed when the email is opened in a text-only viewer.
<b>View</b>	Type the message to be displayed for the link to view the email online.

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## Configuring your company for marketing events

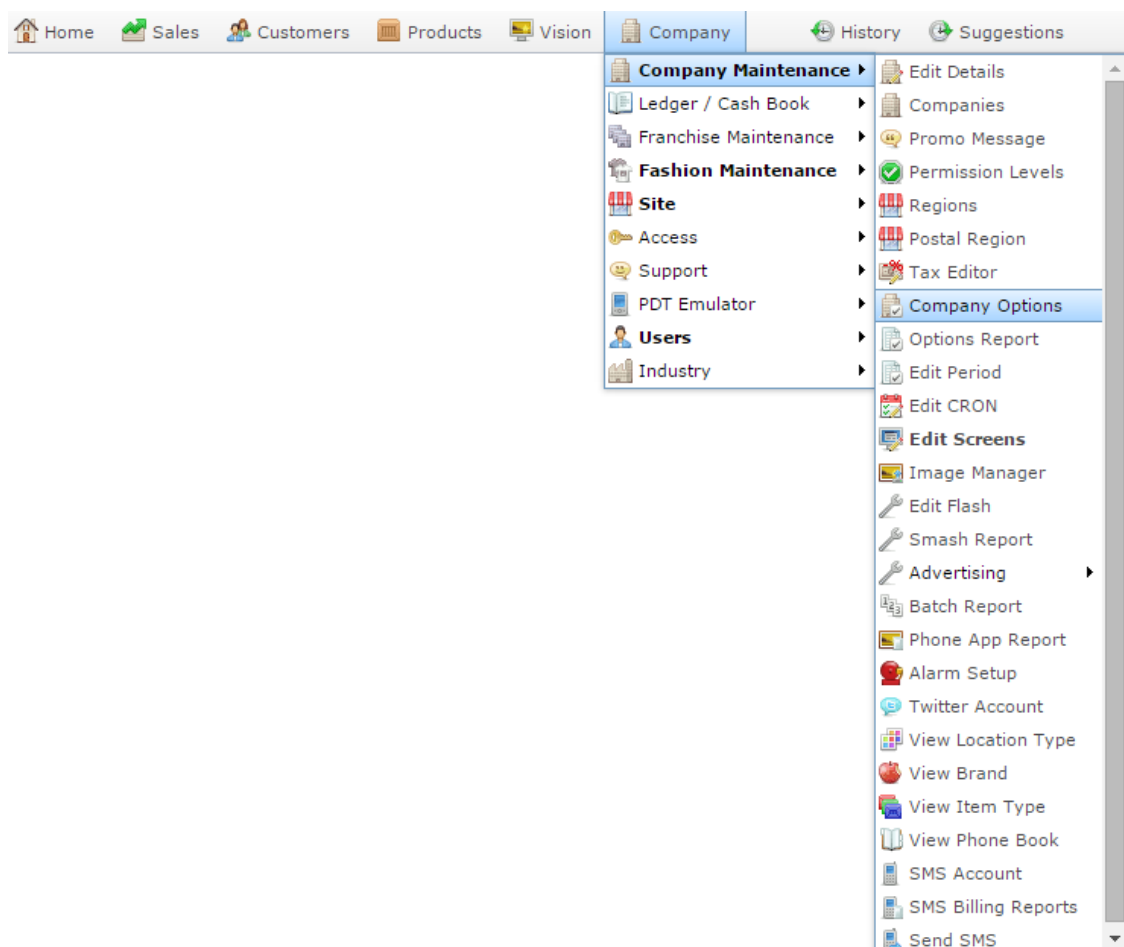
Use the Company Options - Marketing Events section to configure your company for customer marketing reward systems.

**Note:** There are several sections for configuring marketing within your company. Also see: *Configuring your company for marketing information* on page 8, *Configuring your company for marketing emails* on page 12, and *Configuring your company for marketing* on page 4.

## Opening the Company Options - Marketing Events section

To open the Company Options - Marketing Events section:

1. Press  Company.
2. Press Company Maintenance > Company Options.



The Artist section of the Company Options screen is displayed.

3. Open the Section drop-down list.

The screenshot shows the 'Options Maintenance' window for 'Example Company'. The 'Configuration' tab is active. The 'Group' is set to 'Portal' and the 'Section' is set to 'Artist'. A table below lists configuration items for the 'Artist' section. At the bottom right, there are 'Update' and 'Delete' buttons.

Name	Value	Description
Artist Label	Artist	Set to to match company requirements
CD Label Label	CD Label	Set to to match company requirements
Catalog Label	Catalog	Set to to match company requirements
Release Date Label	Release Date	Set to to match company requirements
Title Label	Title	Set to to match company requirements

4. Press Marketing Events from the Section drop-down list.

The Marketing Events section is displayed.

The screenshot shows the 'Options Maintenance' window for 'AMC Master'. The 'Configuration' tab is active. The 'Group' is set to 'Portal' and the 'Section' is set to 'Market Events'. A table below lists configuration items for the 'Market Events' section. At the bottom right, there are 'Update' and 'Delete' buttons.

Name	Value	Description
From		Set to 'From' where customer sees email is from
Reply Address	qa.m@zenglobal.net	Set to address where Client replies to
Return Address	qa.m@zenglobal.net	Set to address where eMail Server messages return to

## Company Options - Marketing section key fields and buttons

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Field	Description
<b>From</b>	Set the 'from' name that appears in customer's inboxes as who the email is from.
<b>Reply Address</b>	Set the address that emails are directed to when a customer replies to a marketing email.  If you want to use the Portal default, leave this field blank.
<b>Return Address</b>	Set the email address that messages from the server are sent to, for example regarding unsuccessful mailing attempts.  If you want to use the Portal default, leave this field blank.

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## Managing marketing and surveys

You can create and manage surveys and marketing mail outs using the Portal. You can also use filters to create small groups of customers you can target according to their survey answers.

### Also see:

#### Customers and events

- *Marketing Customer Maintenance screen* on page 32.
- *Marketing Customer Details report* on page 41.
- *Marketing Event Maintenance screen* on page 52.
- *Loyalty Events report* on page 56.
- *Marketing Member Upload Editor* on page 66.

#### Surveys

- *Marketing Form Maintenance screen* on page 73.
- *Marketing Form Default report* on page 77.
- *Marketing Survey Maintenance screen* on page 110.
- *Marketing Survey Question Maintenance screen* on page 117.
- *Marketing Survey Question Answer Maintenance screen* on page 122.
- *Marketing Survey report* on page 126.
- *Filter Maintenance screen* on page 140.
- *Marketing Filters report* on page 145.
- *Run Survey report* on page 152.

#### Mail outs

- *Email Detail Maintenance screen* on page 193.
- *Email Templates report* on page 190.
- *Marketing Surveys Email Out report* on page 197.
- *Sites Email report* on page 201.
- *Mail Out Detail Maintenance screen* on page 223.
- *Marketing Surveys Mail Out report* on page 225.
- *SMS Detail Maintenance screen* on page 212.
- *Marketing Surveys SMS Out report* on page 219.

- *Sites SMS Summary report* on page 214.
- *Batch Maintenance screen* on page 229.

## What you can do:

### Customers and events

- *Creating a marketing customer* on page 23.
- *Editing a marketing customer* on page 30.
- *Finding a customer* on page 25
- *Creating a marketing event* on page 46.
- *Editing a marketing event* on page 48.
- *Deleting a marketing event* on page 50.
- *Preparing the marketing import CSV file* on page 60.

### Surveys

- *Creating a form style* on page 68.
- *Editing a form style* on page 71.
- *Creating a new survey* on page 81.
- *Editing a survey* on page 84.
- *Creating a new question* on page 87.
- *Edit a question* on page 90.
- *Creating a new answer* on page 93.
- *Editing an answer* on page 97.
- *Deleting an answer* on page 101.
- *Deleting a question* on page 105.
- *Deleting a survey* on page 108.
- *Creating a new filter* on page 131.
- *Editing a filter* on page 134.
- *Deleting a filter* on page 137.
- *Running a survey and viewing results* on page 149

### Mail outs

- *Creating a new email mail out* on page 158.
- *Linking a survey in a mail out* on page 165.

Managing marketing and surveys

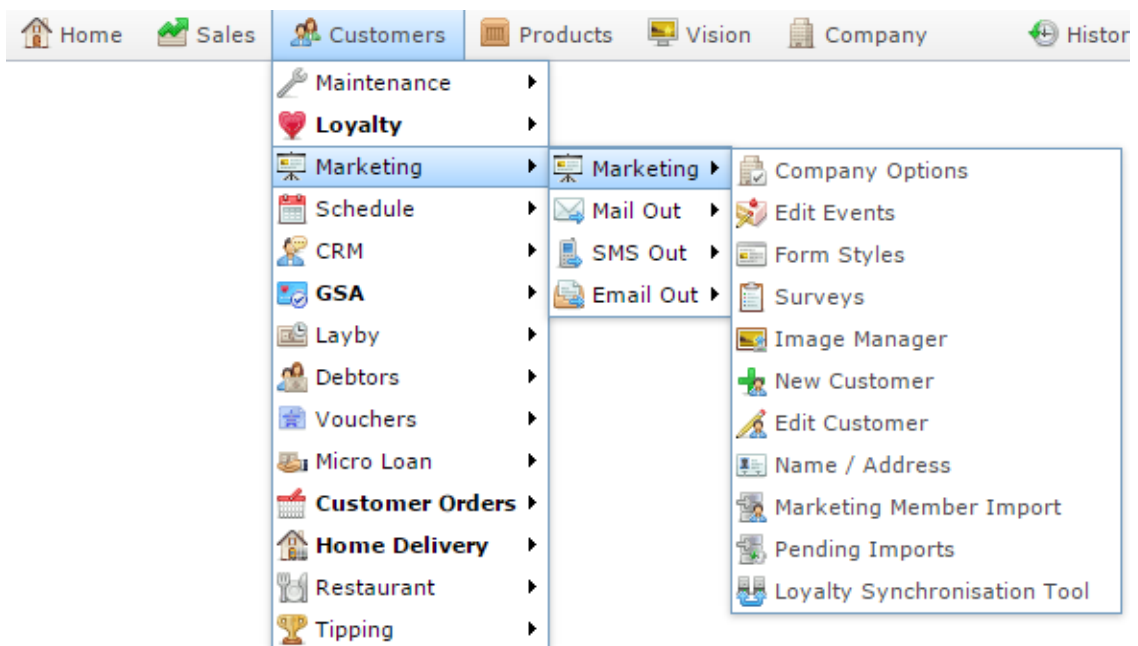
- *Editing email mail outs* on page 186.
- *Deleting email mail outs* on page 188.
- *Creating a new SMS mail out* on page 207.
- *Editing SMS mail outs* on page 210.
- *Deleting SMS mail outs* on page 211.
- *Creating and sending a marketing mail out* on page 170.
- *Creating a marketing mail out to be sent later* on page 174.
- *Creating a marketing mail out triggered by an event* on page 179.
- *Using merge fields to customise mail outs* on page 160.

## Creating a marketing customer

Create a marketing customer to record their responses to your marketing surveys.

To create a marketing customer:

1. Press  Customers.
2. Press Marketing > Marketing > New Customer.



The Marketing Customer Maintenance screen is displayed.

## Managing marketing and surveys

**Marketing Customer Maintenance**

Company: AMC Master  
Customer Name: BIRD,BOB

**Details** **Surveys**

Customer Number: 1904  
Card Number:   
Mobile:   
Title: Mr  
Contact: Weekly  
First Name \*: BOB  
Maximum Contact Per Period: Don't Contact  
Surname \*: BIRD  
Mail: Opt In  
Home Phone:   
Email: Opt In  
Work Phone:   
SMS: Opt In  
Fax:   
Last Contact:  
Last SMS Contact:  
Address:   
Last Email Contact:  
Suburb:   
Last Mail Contact:  
State:   
Country:   
Post Code:   
Comments:   
Email Address:   
PIN:   
Gender: Please Select  
Date of Birth: 1/01/1900  
Company:

3. Type the customer's name in the **First Name** and **Surname** fields.
4. Complete any other fields as required.

See *Marketing Customer Maintenance* screen on page 32.

5. Press .

The customer is saved.



## Finding a customer

Find a customer when you want to:


- View or edit the customer's details.
- Contact the customer.
- Fill a customer order for that customer.
- Perform another task that requires specifying the customer.

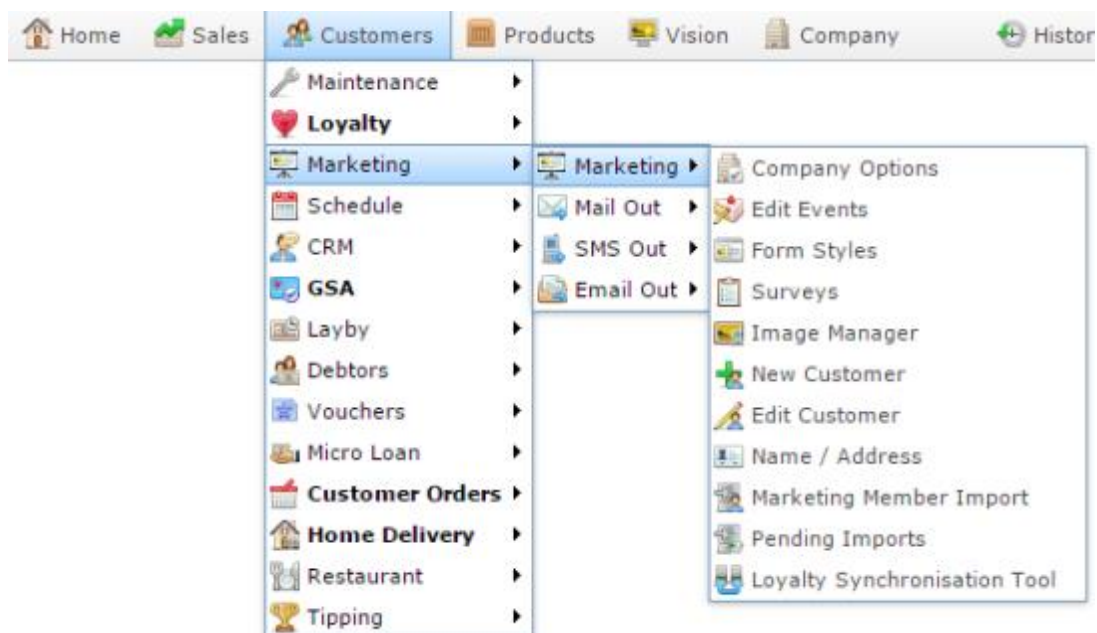
You can either:

- List all customers starting with a chosen letter.
- Search for a customer by typing information in the search fields.

## Opening the Find Customer screen

To open the Find Customer screen:

1. Press  **Customers** in the main menu bar.
2. Press **Marketing > Marketing > Edit Customer**.



The Find Customer screen is displayed.

Managing marketing and surveys

**Find Customer**

Custom A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

**Please choose a field to search on**

Surname:

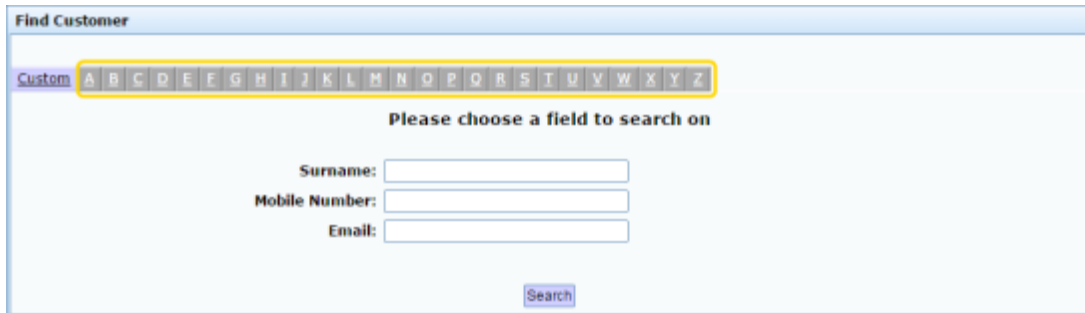
Mobile Number:

Email:

## Listing all customers by letter:

To list customers whose names start with a specific letter alphabetically:

1. Press the corresponding letter of the alphabet at the top of the search screen. .



The screenshot shows a web interface titled "Find Customer". At the top, there is a "Custom" tab and a row of letters from A to Z. The letter 'A' is highlighted with a yellow border. Below the letters, the text "Please choose a field to search on" is displayed. Underneath, there are three input fields labeled "Surname:", "Mobile Number:", and "Email:". At the bottom center, there is a "Search" button.

The customers whose names start with that letter are listed alphabetically.

## Searching for customers

You can search for a customer based on their:

- Name.
- Email address.
- Mobile phone number.

The Portal searches for matches:

- Anywhere within the words of the field.

For example, **APP** matches both **apple**, and **pineapple**. If a field contains multiple words, it matches any word in the field.

- From the start of the customer name or mobile number.

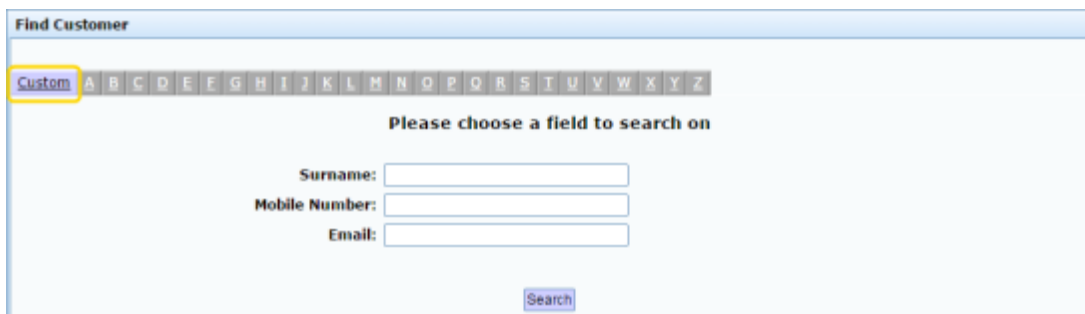
For example, a search for a customer number of **3** returns all customer numbers starting with 3, not all customer numbers that contain 3.

- Using the first search field that contains data.

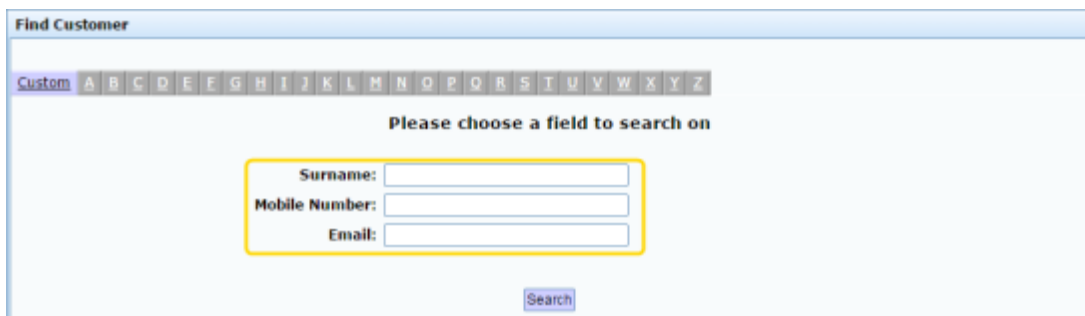
For example, if you type **APP** in the **Name** field and **3** in the **Customer Number** field, the Portal ignores the **Customer Number** field and searches for matches to the customer name.

To search for customers:

1. If the custom search fields are not displayed, press the Custom tab.



2. Type the term you want to search on in the search fields.



**Note:** Because the Portal uses the first field with data that it finds, you should only search for customers using one search field at a time.

3. Press .

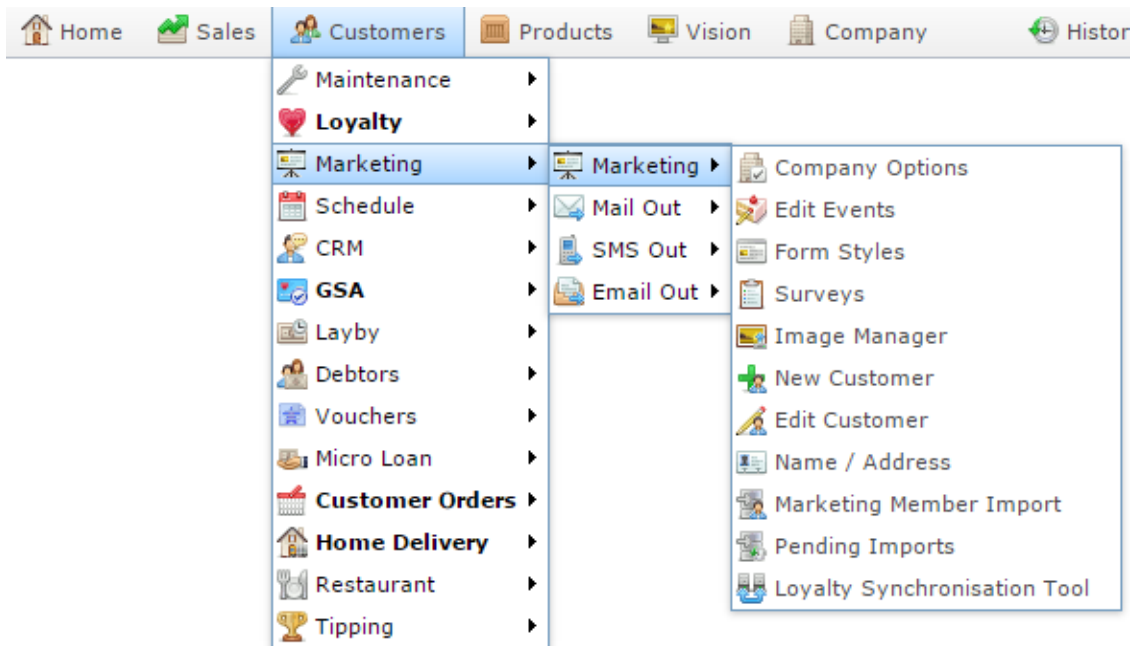
The search results are displayed.

## Editing a marketing customer

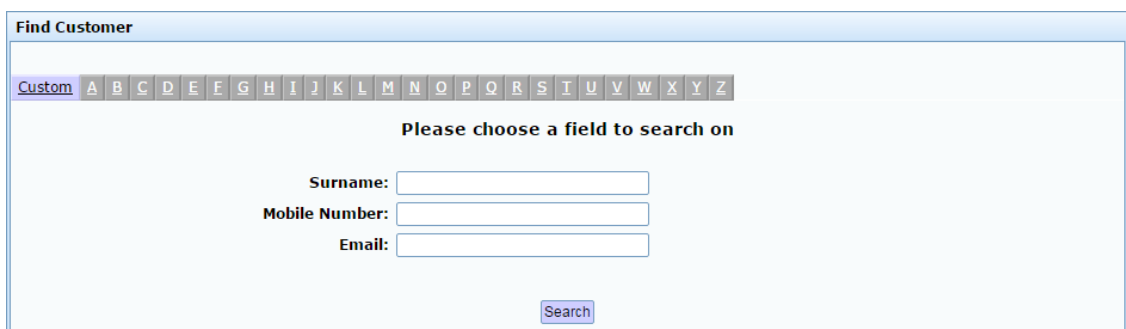
Edit a marketing customer to change their details or view the surveys they have completed.

To edit a marketing customer:

1. Press  Customers.
2. Press Marketing > Marketing > Edit Customer.



The Find Customer screen is displayed.



The 'Find Customer' screen features a search interface. At the top, there is a 'Custom' dropdown followed by a row of buttons for each letter of the alphabet (A-Z). Below this, the text 'Please choose a field to search on' is displayed. Three search fields are provided: 'Surname:', 'Mobile Number:', and 'Email:'. Each field has a corresponding text input box. A 'Search' button is located at the bottom center of the form.

3. Find the customer you want to edit.  
See *Finding a customer* on page 25.

The Marketing Customer Maintenance screen is displayed.

**Marketing Customer Maintenance**

Company: AMC Master  
Customer Name: BIRD,BOB

New Update

Details Surveys

Customer Number: 1904  
Mobile:   
Title: Mr  
First Name \*: BOB  
Surname \*: BIRD  
Home Phone:   
Work Phone:   
Fax:   
Address:   
Suburb:   
State:   
Country:   
Post Code:   
Email Address:   
PIN:   
Gender: Please Select  
Date of Birth: 1/01/1900  
Company:

Card Number:   
Contact: Weekly  
Maximum Contact Per Period: Don't Contact  
Mail: Opt In  
Email: Opt In  
SMS: Opt In  
Last Contact:  
Last SMS Contact:  
Last Email Contact:  
Last Mail Contact:  
Comments:

New Update

4. Make the required changes.

See *Marketing Customer Maintenance* screen on page 32.

5. Press .

The changes are saved.

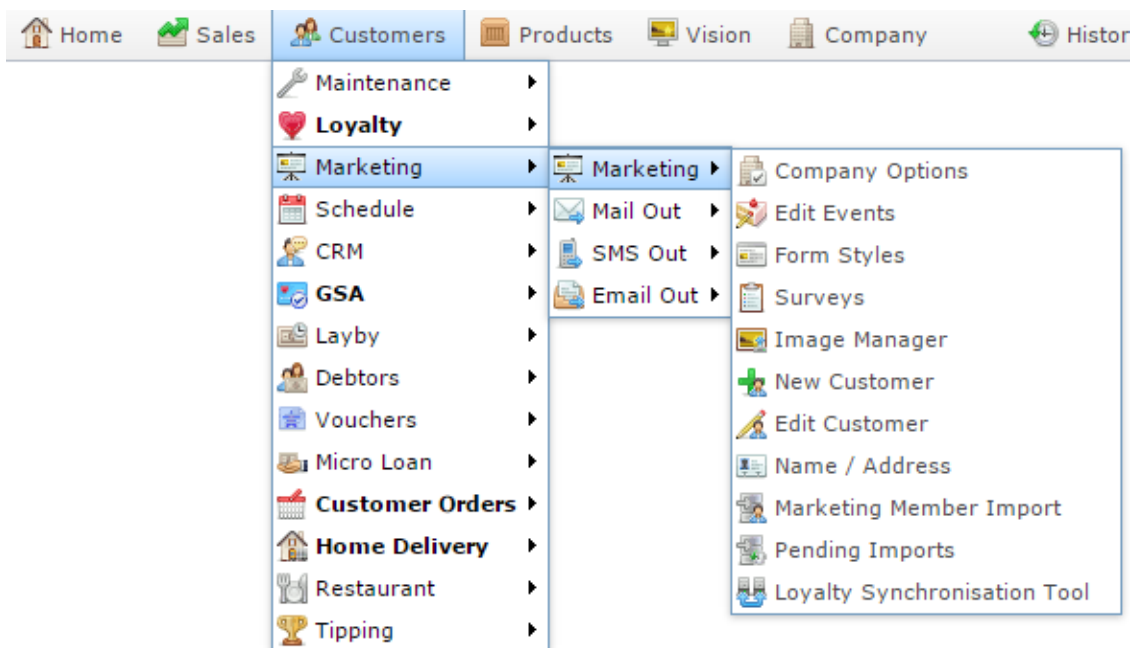
## Marketing Customer Maintenance screen

Use this screen to maintain information on marketing customers and the surveys that have taken.

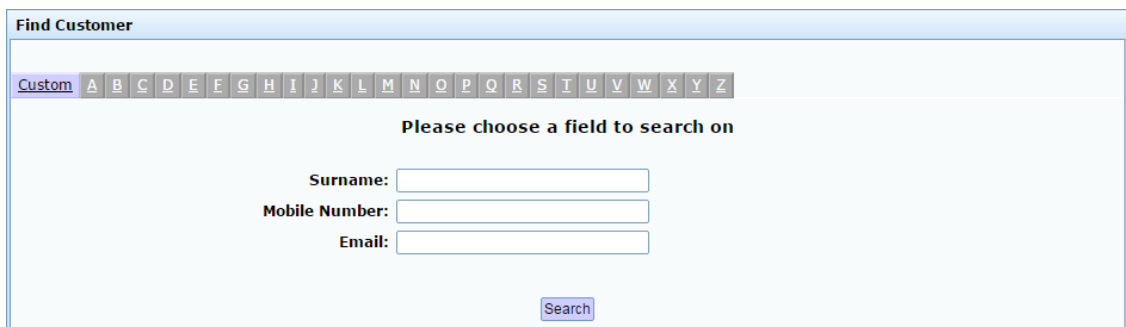
### Opening the Marketing Customer Maintenance screen

To open the Marketing Customer Maintenance screen:

1. Press  Customers .
2. Press Marketing > Marketing > Edit Customer.



The Find Customer screen is displayed.



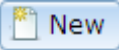
3. Find the customer you want to edit.  
See *Finding a customer* on page 25.

The Marketing Customer Maintenance screen is displayed.

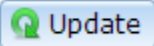


## Marketing Customer Maintenance screen key fields and buttons

### Common fields

Field	Description
<b>Company</b>	The company the marketing customer is associated with.
<b>Customer Name</b>	The name of the customer.
	Press to create a new customer.

---

<b>Field</b>	<b>Description</b>
 Update	Press to save changes to the customer.

---

## Details tab

Paragraph introducing area

**Marketing Customer Maintenance**

Company:

Customer Name: BIRD,BOB

---

**Details** | **Surveys**

<p>Customer Number: 1904</p> <p>Mobile: <input type="text"/></p> <p>Title: <input type="text" value="Mr"/></p> <p>First Name *: <input type="text" value="BOB"/></p> <p>Surname *: <input type="text" value="BIRD"/></p> <p>Home Phone: <input type="text"/></p> <p>Work Phone: <input type="text"/></p> <p>Fax: <input type="text"/></p> <p>Address: <input type="text"/></p> <p>Suburb: <input type="text"/></p> <p>State: <input type="text"/></p> <p>Country: <input type="text"/></p> <p>Post Code: <input type="text"/></p> <p>Email Address: <input type="text"/></p> <p>PIN: <input type="text"/></p> <p>Gender: <input type="text" value="Please Select"/></p> <p>Date of Birth: <input type="text" value="1/01/1900"/></p> <p>Company: <input type="text"/></p>	<p>Card Number: <input type="text"/></p> <p>Contact: <input type="text" value="Weekly"/></p> <p>Maximum Contact Per Period: <input type="text" value="Don't Contact"/></p> <p>Mail: <input type="text" value="Opt In"/></p> <p>Email: <input type="text" value="Opt In"/></p> <p>SMS: <input type="text" value="Opt In"/></p> <p>Last Contact: <input type="text"/></p> <p>Last SMS Contact: <input type="text"/></p> <p>Last Email Contact: <input type="text"/></p> <p>Last Mail Contact: <input type="text"/></p> <p>Comments: <div style="border: 1px solid #ccc; height: 100px; width: 100%;"></div></p>
---	---

<b>Field</b>	<b>Description</b>
<b>Customer Number</b>	<p>The unique code that identifies the marketing customer.</p> <div style="border: 1px solid #ccc; background-color: #e6f2ff; padding: 10px; margin-top: 10px;"> <p><b>Note:</b> This is not related to any debtor account or loyalty card number they may have.</p> </div>
<b>Mobile</b>	<p>Customer's mobile number.</p>

---

<b>Field</b>	<b>Description</b>
<b>Title</b>	Customer's preferred salutation.
<b>First Name</b>	Customer's first name.
<b>Surname</b>	Customer's last name.
<b>Home Phone</b>	Customer's home phone number.
<b>Work Phone</b>	Customer's work phone number.
<b>Fax</b>	Customer's fax number.
<b>Address</b>	Customer's postal address.
<b>Suburb</b>	The customer's suburb.
<b>State</b>	The customer's state.
<b>Country</b>	Country the customer lives in.
<b>Post Code</b>	The customer's post code.
<b>Email Address</b>	Customer's email address.
<b>PIN</b>	PIN number the customer uses to identify themselves when looking at or changing their survey responses.

---

<b>Field</b>	<b>Description</b>
<b>Gender</b>	Customer's gender.
<b>Date of Birth</b>	Customer's date of birth.
<b>Company</b>	Customer's company name.
<b>Card Number</b>	Customer's loyalty card number.
<b>Contact</b>	Frequency the customer desires contact.
<b>Maximum Contact Per Period</b>	Maximum number of times customer can be contacted during the contact period.
<b>Mail</b>	Whether the customer has opted in to receive contact via mail.
<b>Email</b>	Whether the customer has opted in to receive contact via email.
<b>SMS</b>	Whether the customer has opted in to receive contact via SMS.
<b>Last Contact</b>	Date the customer was last contacted.
<b>Last SMS Contact</b>	Date the customer was last contacted by SMS.
<b>Last Email Contact</b>	Date the customer was last contacted by email.
<b>Last Mail Contact</b>	Date the customer was last contacted by mail.

Managing marketing and surveys

---

<b>Field</b>	<b>Description</b>
<b>Comments</b>	Any comment regarding the customer.

---

## Survey tab

This tab lists surveys the customer has completed.

**Marketing Customer Maintenance**

Company:

Customer Name: BIRD,BOB

Details **Surveys**

Description	Survey #	Date	Questions
Bob Test Survey	2	08 SEP 2009	8
Clives Survey	25	11 MAY 2014	1
First Survey	1	02 JUN 2008	3
Gregs Test	3	02 JUN 2008	3
Poste Code	6	10 OCT 2008	1
Survey	5	28 AUG 2008	1
Thirsty Camel Form	4	28 MAY 2008	6

### Field

### Description

#### Description

Description of the survey.

#### Survey #

Unique code identifying the survey.

#### Date

Date the survey was completed.

---

<b>Field</b>	<b>Description</b>
<b>Questions</b>	Number of questions in the survey.

---



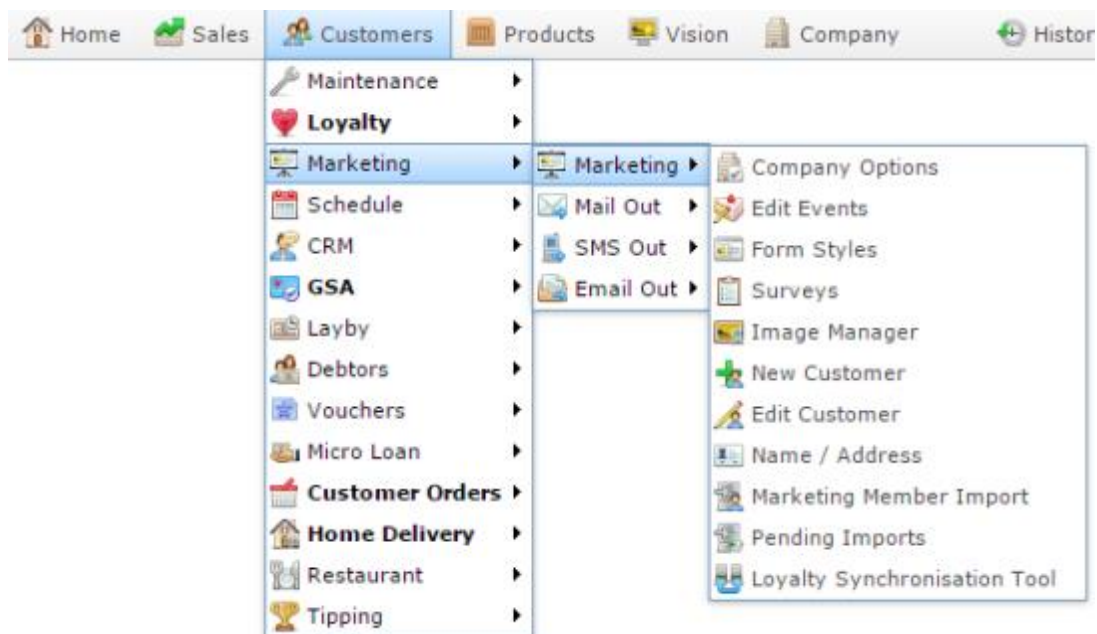
## Marketing Customer Details report

Use the Marketing Customer Details report to view information on your marketing customers.

### Opening the Marketing Customer Details report

To open the Marketing Customer Details report:

1. Press  Customers.
2. Press Marketing > Marketing > Name / Address.



The Marketing Customer Details report is displayed.

Managing marketing and surveys

### Marketing Customer Details

Name	Address	Suburb	State	Post Code	Mobile	Phone	Alt Phone	Email	Gender	Last Contact	DOB
*								preeda@			
*								princer@			
*								prasert@			
*								prakam			
*								prachek			
*								princer@			
*								princer@			
*								publish			
*								pth@m			
*								pronpot			
*								project.			
*								post@t			
*								por_nu			
*								bj@hot			

**Options**

All >

**Birth Month**

None >

**Age Range**

None >

**Gender**

Both >

**Names**

None >

Add to Favourites

## Marketing Customer Details report key fields

### Filters area

Use this area to filter the results shown in the report.

Field	Description
<div style="border: 1px solid #ccc; border-radius: 4px; padding: 2px 10px; display: inline-block;">Add to Favourites</div>	Press to add this report to your Portal favourites for easier access.
<b>Options</b>	Limit the customer list to customers who have opted in to receive marketing material via: <ul style="list-style-type: none"> <li>▪ Mail.</li> <li>▪ Email.</li> <li>▪ SMS.</li> </ul> Or select All to not limit by opt-in selection.
<b>Gender</b>	Select to restrict the report by gender.
<b>Birth Month</b>	Filter the report on the customer's birth month.
<b>Age Range</b>	Filter the report by the customer's age.
<b>Names</b>	Filter the report by the letter the customer's first or last names start with.

## Report area

This area displays report information.

**Note:** Not all fields may be displayed at once. Some fields depend on your filter field selections.

Field	Description
<b>Name / Customer / Customer Name / Debtor</b>	Name of the debtor or customer.
<b>Mobile</b>	Customer's mobile number
<b>Alt Phone</b>	An alternative phone number
<b>Email</b>	Contact email address.
<b>Address</b>	Contact address.
<b>Address</b>	Contact address.
	<b>Note:</b> Two fields are provided for the address to allow for units, apartments or similar additional address information.
<b>Gender</b>	The loyalty member's gender.

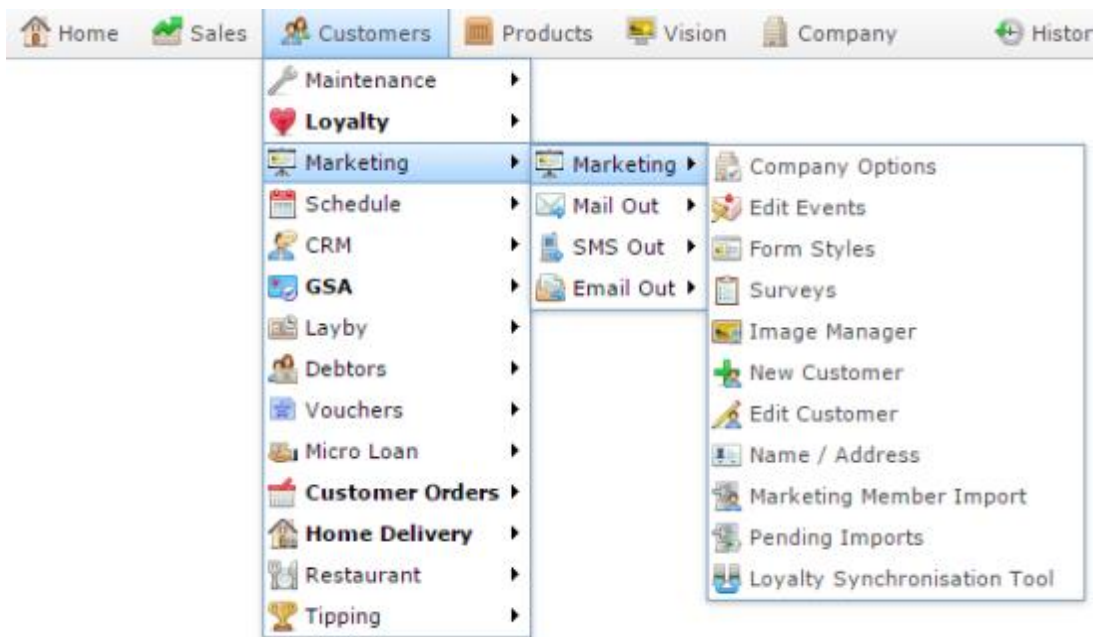
Field	Description
Suburb	Customer's suburb.
State	Customer's state.
Post Code	Customer's post code.
Phone	Customer's phone number.
Gender	Customer's gender.
Last Contact	Date the customer was last contacted.
DOB	Customer's date of birth.

## Creating a marketing event

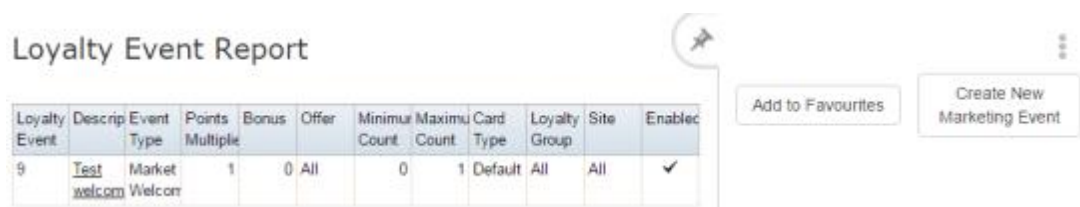
Create a marketing event to respond to a customer when a particular situation occurs. For example, when a customer first signs up to your marketing program.

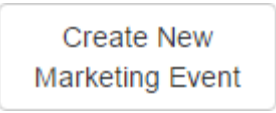
To create a marketing event:

1. Press  Customers.
2. Press Marketing > Marketing > Edit Events.




The Loyalty Event report is displayed.



3. Press .

The Marketing Event Maintenance screen is displayed.

The screenshot shows a web form titled "Marketing Event Maintenance" with a sub-tab "Editing New Event". The form is organized into two columns. The left column contains: "Event Id:" (text input), "Description:" (text input), "Event Type:" (dropdown menu with "Market Welcome" selected), "Start Date:" (calendar icon and date "22/06/2016"), "Expiry Date:" (calendar icon and date "23/06/2017"), "Start Hour:" (dropdown menu with "Midnight" selected), "End Hour:" (dropdown menu with "11 PM" selected), and "How Often:" (dropdown menu with "Single Event During Period" selected). The right column contains: "Day:" (dropdown menu with "Every Day" selected), "Month:" (dropdown menu with "Every Month" selected), "Year:" (dropdown menu with "Every Year" selected), "Enabled:" (dropdown menu with "Yes" selected), "Site:" (dropdown menu with "All" selected), "Location Exceptions ( eg 1,2,3 ):" (text input), "SMS Job:" (text input with "0"), "Email Job:" (text input with "0"), "SMS Message:" (text input), "Return Email Address:" (text input), "Email Subject:" (text input), and "Email Message:" (large text area). At the bottom right, there are two buttons: "Save" (with a floppy disk icon) and "History".

4. Type a description to identify the event in the **Description** field.
5. Select the type of event in the **Event Type** field.
6. Select the time the event starts and stops in the **Start Date**, **Expiry Date**, **Start Hour**, **End Hour** fields.
7. Press  **Save**.

The event is created.

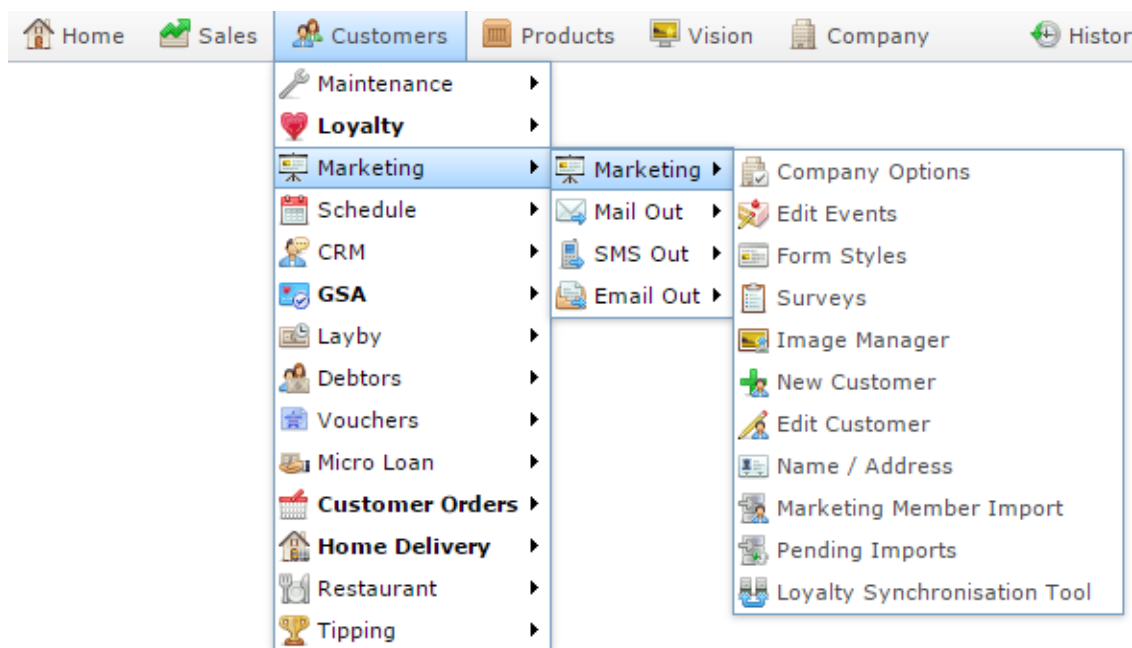
## Editing a marketing event

Edit a marketing event to change the time it runs or set up a triggered mail out.

See *Creating a marketing mail out triggered by an event* on page 179.

To edit a marketing event:



1. Press  Customers.
2. Press Marketing > Marketing > Edit Events.



The Loyalty Event report is displayed.

Loyalty Event Report

Loyalty Event	Descript	Event Type	Points Multiplie	Bonus	Offer	Minimur Count	Maximu Count	Card Type	Loyalty Group	Site	Enabled
9	Test welcom	Market Welcom	1	0	All	0	1	Default	All	All	✓

Add to Favourites    Create New Marketing Event

3. Press the Description field of the event you want to edit.  
A popup menu is displayed.
4. Press Edit Loyalty Event.  
The Marketing Event Maintenance screen is displayed.



**Marketing Event Maintenance**

Editing Marketing "[9]"

Event Id: 9      Day: Every Day

Description: Test welcome      Month: Every Month

Event Type: Market Welcome      Year: Every Year

Start Date: 4/07/2016      Enabled: Yes

Expiry Date: 5/07/2017      Site: All

Start Hour: Midnight      Location Exceptions ( eg 1,2,3 ):

End Hour: 11 PM      SMS Job: 0

How Often: Single Event During Period      Email Job: 0

SMS Message:

Return Email Address:

Email Subject:

Email Message:

New Delete Save History

5. Make the required changes.

See *Marketing Event Maintenance* screen on page 52.

6. Press  Save.

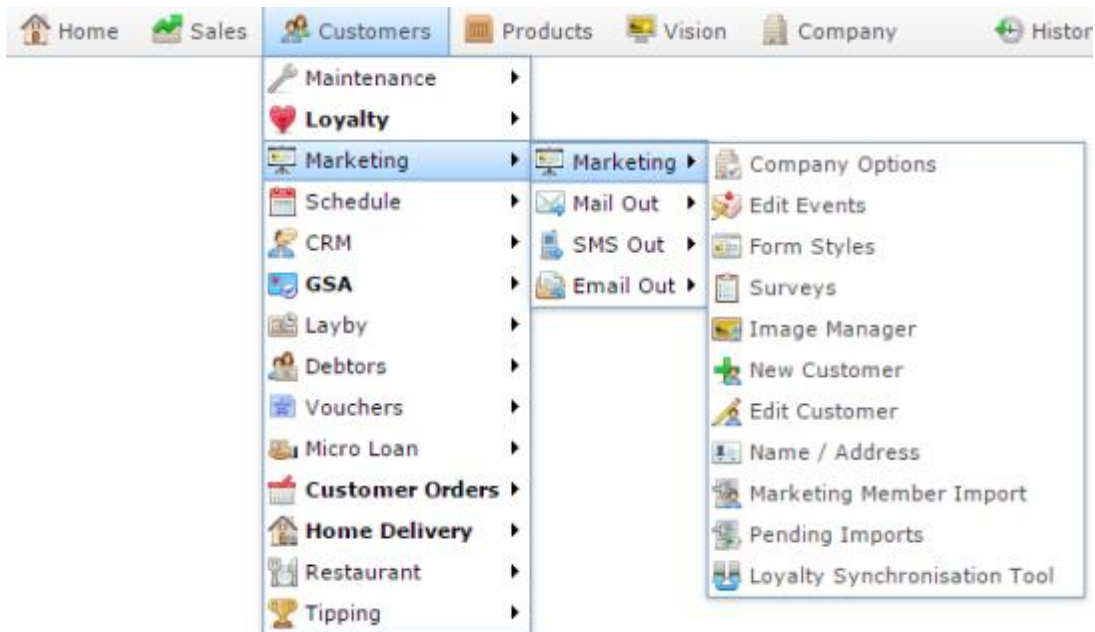
The event is saved.

## Deleting a marketing event

Delete a marketing event to remove it and its event history from the Portal.

To delete a marketing event:

1. Press  Customers.
2. Press Marketing > Marketing > Edit Events.



The Loyalty Event report is displayed.

Loyalty Event Report

Loyalty Event	Descrip	Event Type	Points Multiple	Bonus	Offer	Minimu Count	Maximu Count	Card Type	Loyalty Group	Site	Enabled
9	Test wel.com	Market Welcom	1	0	All	0	1	Default	All	All	✓

Buttons: Add to Favourites, Create New Marketing Event

3. Press the Description field of the event you want to delete.  
A popup menu is displayed.
4. Press Edit Loyalty Event.  
The Marketing Event Maintenance screen is displayed.

The image shows a 'Marketing Event Maintenance' window with the following fields and values:

Event Id:	9	Day:	Every Day
Description:	Test welcome	Month:	Every Month
Event Type:	Market Welcome	Year:	Every Year
Start Date:	4/07/2016	Enabled:	Yes
Expiry Date:	5/07/2017	Site:	All
Start Hour:	Midnight	location Exceptions ( eg 1,2,3 ):	
End Hour:	11 PM	SMS Job:	0
How Often:	Single Event During Perloc	Email Job:	0
		SMS Message:	
		Return Email Address:	
		Email Subject:	
		Email Message:	

At the bottom right of the form are four buttons: New, Delete, Save, and History.

5. Press  .

The event is deleted.

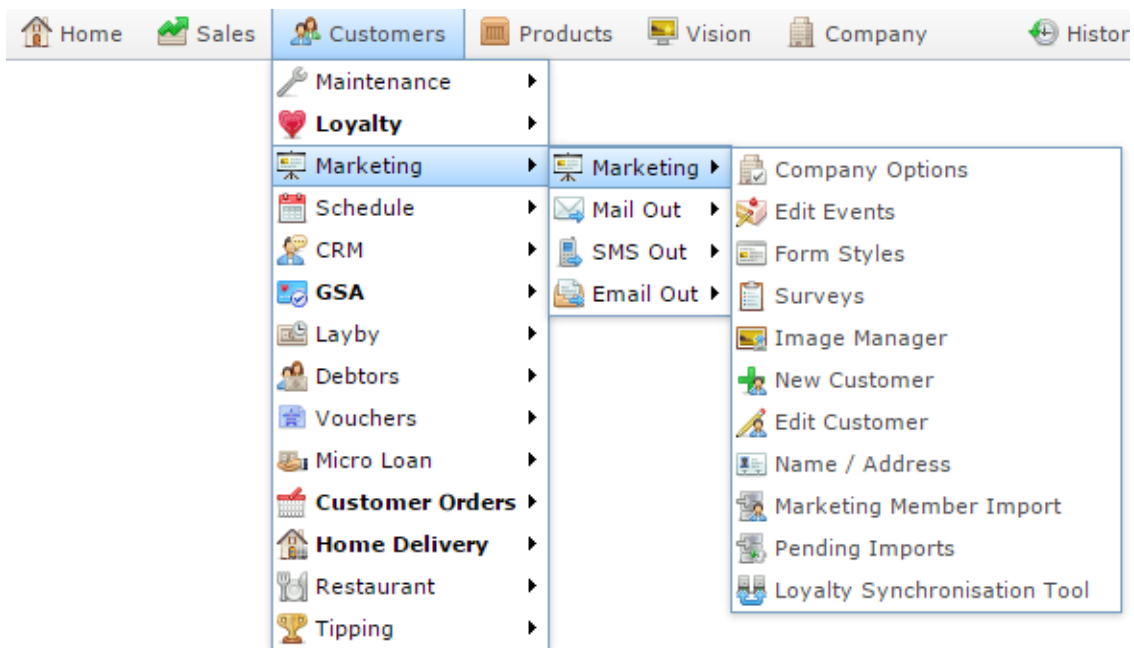
## Marketing Event Maintenance screen

Use this screen to create and edit marketing events for your company to respond to your customers automatically when certain situations arise, such as the customer joining your marketing program.

### Opening the Marketing Event Maintenance screen

To open the Marketing Event Maintenance screen:

1. Press  Customers.
2. Press Marketing > Marketing > Edit Events.



The Loyalty Event report is displayed.

Loyalty Event Report

Loyalty Event	Descrip	Event Type	Points Multiplie	Bonus	Offer	Minimu Count	Maximu Count	Card Type	Loyalty Group	Site	Enabled
9	<u>Test welcom</u>	Market Welcom	1	0	All	0	1	Default	All	All	✓

Buttons: Add to Favourites, Create New Marketing Event

Button: Create New Marketing Event

3. Press .

The Marketing Event Maintenance screen is displayed.

The screenshot shows a web form titled "Marketing Event Maintenance" with a sub-header "Editing Marketing '[9]'" and the following fields:

- Event Id: 9
- Description: Test welcome
- Event Type: Market Welcome
- Start Date: 4/07/2016
- Expiry Date: 5/07/2017
- Start Hour: Midnight
- End Hour: 11 PM
- How Often: Single Event During Period
- Day: Every Day
- Month: Every Month
- Year: Every Year
- Enabled: Yes
- Site: All
- location Exceptions ( eg 1,2,3 ): [ ]
- SMS Job: 0
- Email Job: 0
- SMS Message: [ ]
- Return Email Address: [ ]
- Email Subject: [ ]
- Email Message: [ ]

Buttons at the bottom right: New, Delete, Save, History.

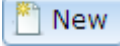
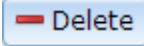
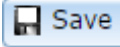
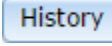
## Marketing Event Maintenance screen key fields and buttons

Field	Description
<b>Event Id</b>	Unique code identifying the event.
<b>Description</b>	Description of the event.
<b>Event Type</b>	Select the type of event to create.
	<b>Note:</b> Event types are defined by the Portal.
<b>Start Date</b>	Date the event starts.
<b>Expiry Date</b>	Date the event ends.
<b>Start Hour</b>	Time of day the event starts.

---

<b>Field</b>	<b>Description</b>
<b>End Hour</b>	Time of day the event ends.
<b>How Often</b>	How often the event is triggered during the event period.
<b>Day</b>	Select a specific date or day of week for this event to run, or to run every day.
<b>Month</b>	Select a specific month for this event to run, or to run every month.
<b>Year</b>	Select a specific year for this event to run, or to run every year.
<b>Enabled</b>	Select whether this event is enabled in the Portal.
<b>Site</b>	Select the site this event will run for.
<b>Location Exceptions</b>	Type the location codes for any locations that should not participate in this event.
<b>SMS Job</b>	Type the job number of SMS messages sent regarding this event to use the job's SMS and filter settings to send a specific marketing SMS when this event is triggered.  See <i>Creating a marketing mail out triggered by an event</i> on page 179.

---

Field	Description
<b>Email Job</b>	<p>Type the job number of emails sent regarding this event to use the job's email and filter settings to send a specific marketing email when this event is triggered.</p> <p>See <i>Creating a marketing mail out triggered by an event</i> on page 179.</p>
<b>SMS Message</b>	<p>Type the SMS message to send regarding this event.</p>
<b>Return Email Address</b>	<p>Type the return email address used for emails sent for this event.</p>
<b>Email Subject</b>	<p>Type the email subject used in the emails sent about this event.</p>
<b>Email Message</b>	<p>Type the email message sent regarding this event.</p>
	<p>Press to create a new marketing event.</p>
	<p>Press to delete this marketing event.</p>
	<p>Press to save this event.</p>
	<p>Press to view a report of the responses to this event.</p> <p>See <i>Loyalty Events History report</i>.</p>

## Loyalty Events report

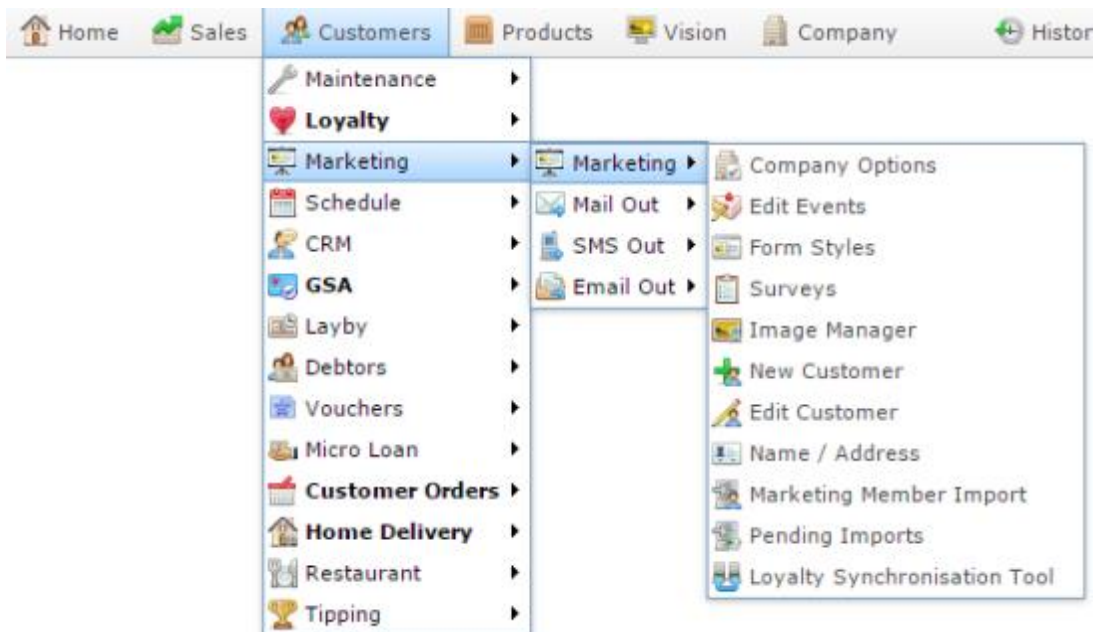
Use the Loyalty Events report to view past loyalty events such as customers joining your loyalty program, or having birthdays. Press an event's description to drill down into the specific event details.

See *Loyalty Events History report*.

## Opening the Loyalty Events report

To open the Loyalty Events report:

1. Press  Customers.
2. Press Marketing > Marketing > Edit Events.



The Loyalty Event report is displayed.

Loyalty Event Report

Loyalty Event	Descrip	Event Type	Points Multiple	Bonus	Offer	Minimu Count	Maximu Count	Card Type	Loyalty Group	Site	Enabled
9	Test	Market	1	0	All	0	1	Default	All	All	✓
	welcom	Welcom									

Buttons: Add to Favourites, Create New Marketing Event


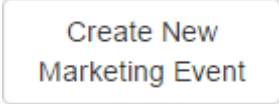


## Loyalty Events report key fields

### Filters area

Use this area to filter the results shown in the report.

---

Field	Description
	Press to add this report to your Portal favourites for easier access.
	Press to create a new event.

---

## Report area

This area displays report information.

**Note:** Not all fields may be displayed at once. Some fields depend on your filter field selections.

Field	Description
<b>Loyalty Event</b>	Unique code identifying the loyalty event.
<b>Description</b>	Description of the loyalty event. For example, a birthday bonus.
<b>Event Type</b>	Type of loyalty event.
<b>Points Multiplier</b>	The number that all loyalty points accrued at this event are multiplied by. For example, if all loyalty points are doubled, the multiplier is 2.
<b>Bonus</b>	The loyalty point bonus accrued at this event.
<b>Offer</b>	The offers that this event is eligible for.
<b>Minimum Count</b>	The number of items a loyalty member must purchased to participate in this event.

---

Field	Description
<b>Maximum Count</b>	The maximum number of items a loyalty member may purchase while participating in this event.
<b>Card Type</b>	The card type of the loyalty member.
<b>Loyalty Group</b>	The loyalty groups that were eligible to participate in the event.
<b>Site</b>	The site the event occurred at.
<b>Enabled</b>	Whether the event is currently active in the Portal.

---

## Preparing the marketing import CSV file

You can import marketing information into the Portal via a Comma Separated Value (CSV) file.

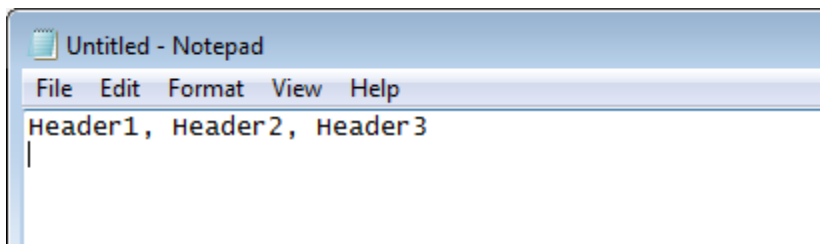
CSV files are text files that list each record in a separate line, with the fields separated by commas. CSV files usually have a "header row" at the top of the file which specifies the order of the fields. You can put fields in any order you want, as long as you use the field headers that the Portal recognises.

To prepare the file for import:

1. Create blank a text file.
2. At the top of the file, add the header fields, separated by a comma. These fields tell the Portal what order you're going to put the information in.

**Tip:** You can use a space in addition to the comma if you want the file to be easier to read, as in the example shown.

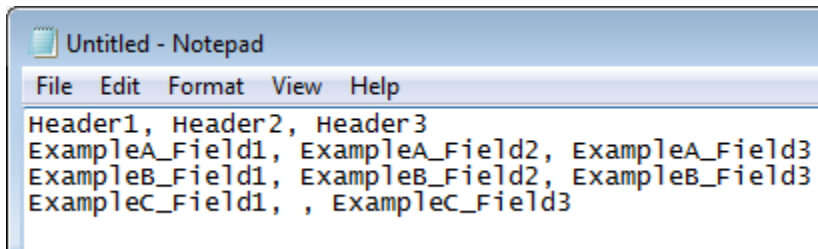
**Note:** Some fields are compulsory; others may be optional. See the table below for more details.



3. Add each record on its own line with:
  - The fields in the same order as the header fields.
  - Each field separated by a comma.

**Tip:** Make sure the fields you're typing don't have a comma within the field, or the file will not upload properly. For example, if a description field is originally **Green with red, blue, and yellow stripes**, you must remove the commas to be **Green with red blue and yellow stripes**.

**Note:** It does not matter if the fields don't "line up" vertically. But make sure all fields are in the same order as the header fields. If you need to leave a field empty, add the comma that would have separated that field. For example: Field1, , Field3.



```
Untitled - Notepad
File Edit Format View Help
Header1, Header2, Header3
ExampleA_Field1, ExampleA_Field2, ExampleA_Field3
ExampleB_Field1, ExampleB_Field2, ExampleB_Field3
ExampleC_Field1, , ExampleC_Field3
```

4. When you have added all the records you want to import, save the text file.

The file is ready for importing.

See *Importing gambling marketing data*.

## Marketing Import CSV File Headers

Use this table to create the header line and order the information in your CSV file.

Field	Description
<b>First</b>	The customer's first name. <b>Note:</b> This field is compulsory.
<b>Surname</b>	The customer's last name. <b>Note:</b> This field is compulsory.
<b>Email</b>	The customer's email address. <b>Note:</b> This field is compulsory. You can use a value of N/A if the email address is not available.
<b>Mobile</b>	The customer's mobile phone number. <b>Note:</b> This field is compulsory.
<b>MARKETID</b>	The survey identification number.
<b>QUESTION</b>	The question the customer has answered.

Field	Description
<b>ANSWER</b>	The answer selected by the customer.
<b>DOB</b>	The customer's date of birth, written as YYYY-MM-DD.
<b>TITLE</b>	The customer's preferred salutation, such as Dr, Ms or Mrs.
<b>GENDER</b>	The customer's gender.
<b>OPTOUTMAIL</b>	<p>Indicates whether the customer has opted out of receiving marketing via posted mail. Acceptable values are:</p> <ul style="list-style-type: none"> <li>▪ 1, T or True if the customer has opted out.</li> <li>▪ 0, F, False if the customer has not opted out.</li> </ul>
<b>OPTOUTEMAIL</b>	<p>Indicates whether the customer has opted out of receiving marketing via email. Acceptable values are:</p> <ul style="list-style-type: none"> <li>▪ 1, T or True if the customer has opted out.</li> <li>▪ 0, F, False if the customer has not opted out.</li> </ul>

---

Field	Description
<b>OPTOUTSMS</b>	Indicates whether the customer has opted out of receiving marketing via SMS. Acceptable values are: <ul style="list-style-type: none"><li data-bbox="967 573 1366 640">▪ <b>1, T or True</b> if the customer has opted out.</li><li data-bbox="967 663 1366 730">▪ <b>0, F, False</b> if the customer has not opted out.</li></ul>
<b>COMPANY</b>	The customer's company.
<b>ADDRESS1</b>	The customer's postal address.
<b>ADDRESS2</b>	Any additional information on the customer's address, such as a unit number.
<b>SUBURB</b>	The customer's suburb.
<b>POSTCODE</b>	The customer's postcode
<b>STATE</b>	The customer's state or territory.
<b>COUNTRY</b>	The customer's country.
<b>PROMO</b>	The place the data was captured from for upload. For example, a promotion email or flier.

---



Field	Description
<b>CUSTOMER</b>	<p>Unique code identifying the customer in the marketing database.</p> <p>If no customer number is provided, the Portal attempts to match the customer account via the mobile number, or creates a new account if no account can be found.</p> <div data-bbox="914 779 1391 943" style="border: 1px solid #4a7ebb; background-color: #d9e1f2; padding: 5px;"> <p><b>Note:</b> This is not the customer's loyalty or debtor account number.</p> </div>
<b>PHONE</b>	<p>The customer's landline phone number.</p>
<b>PHONE1</b>	<p>The customer's alternate phone number.</p>
<b>FAX</b>	<p>The customer's fax number.</p>


## Marketing Member Upload Editor

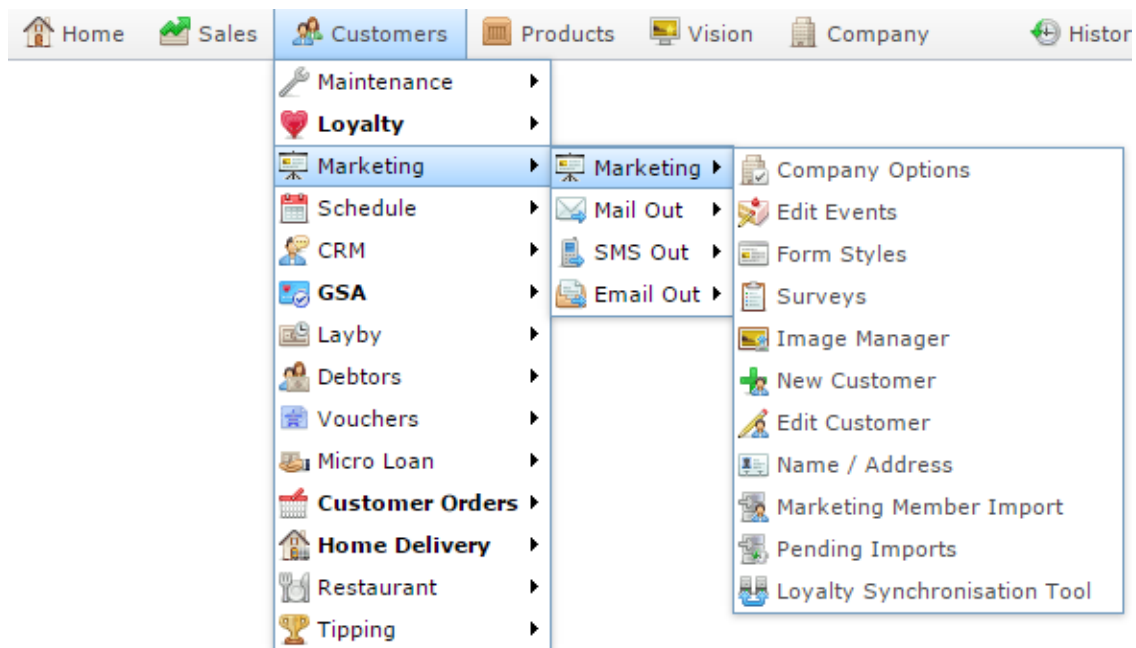
Use this window to import a file with marketing member information into the Portal.

See *Preparing the marketing import CSV file* on page 60.

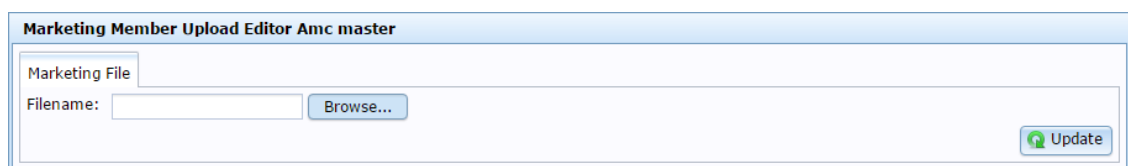
### Opening the Marketing Member Upload Editor screen

To open the Marketing Member Upload Editor screen:

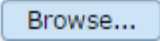
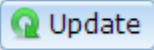
1. Press  **Customers** from the menu bar.
2. Press **Marketing > Marketing > Marketing Member Import**.



The Marketing Member Upload Editor screen is displayed.



## Marketing Member Upload Editor screen key fields and buttons

Field	Description
<b>Filename</b>	The name of the file to import.
	Press to open the browser file chooser and find your import file.
	Import the selected file.

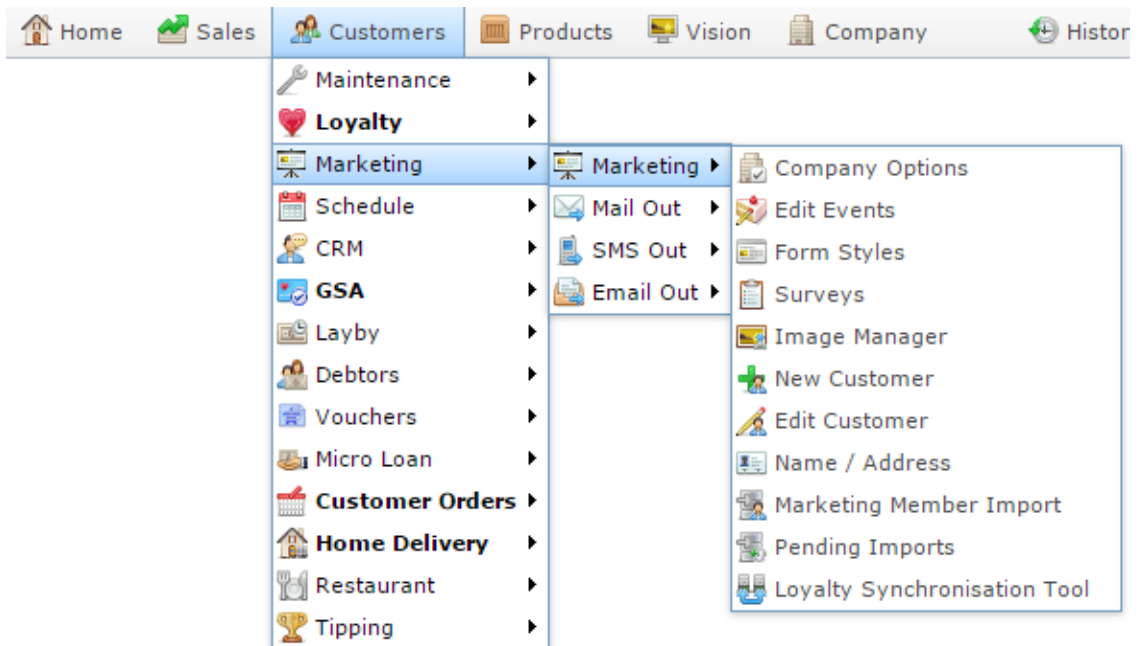
## Creating a form style

Create a form style to have a new look for surveys.

**Note:** Form styles cannot be deleted.

To create a form style:

1. Press  Customers.
2. Press Marketing > Marketing > Form Styles.



The Marketing Form Default report is displayed.

### Marketing Form Default Report

Name	ID	Image Top Left	Image Top Right	Image Backgr	Image Bar	Image Submit	Font	Font Weight	Table Width	Borders	User
Tasmar Devil	1						verdana	80	80%	0	Bob
Tree Survey	2						verdana	80	80%	0	Bob
Thirsty Camel	3						arial	80	80%	1	Les
Les Form	4						arial	80	80%	2	Les
Test Form	5						arial black	80	80%	0	Ben

Add to Favourites

Create a Marketing Form

Create a Marketing Form

3. Press

The Marketing Form Maintenance screen is displayed.

**Marketing Form Maintenance**

Forms: Test Form

**Form**

Description: Test Form

Title: Test

Sponsor Message: Brought to you by AMC Convergent IT and Zen Global Marketing

Table Percentage: 80%

Table Border: 0

Font: arial black Font Size (%): 80% Font Weight: Normal

Text Colour: None (Black) Test Colours

Background Colour: Red

Top Left Image: None Height: 0 Width: 0

Top Right Image: None Height: 0 Width: 0

Bar Image: 2000.jpg Height: 0 Width: 0

Background Image: None

Submit Image: 2000.jpg Height: 0 Width: 0

Comment:

Save

4. Type a description of the style in the **Description** field.

5. Change the fields as required.

See *Marketing Form Maintenance* screen on page 73.

6. Press Save.

Managing marketing and surveys

The form style is created.

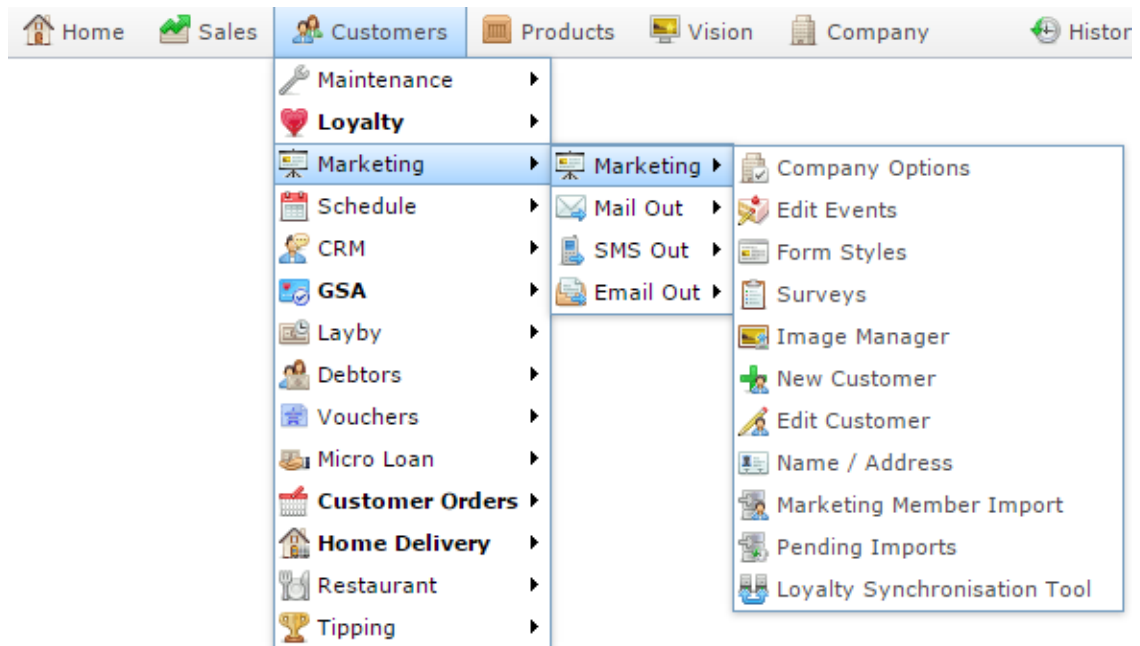
## Editing a form style

Edit a form style to change how surveys that use the style appear.

**Note:** Form styles cannot be deleted.

To edit a form style:

1. Press  Customers.
2. Press Marketing > Marketing > Form Styles.



The Marketing Form Default report is displayed.

### Marketing Form Default Report

Name	ID	Image Top Left	Image Top Right	Image Backgrn	Image Bar	Image Submit	Font	Font Weight	Table Width	Borders	User
Tasmar Devil	1						verdana	80	80%	0	Bob
Tree Survey	2						verdana	80	80%	0	Bob
Thirsty Camel	3						arial	80	80%	1	Les
Les Form	4						arial	80	80%	2	Les
Test Form	5						arial black	80	80%	0	Ben

Add to Favourites

Create a Marketing Form

- Press the **Name** of the form you want to edit.

The Marketing Form Maintenance screen is displayed.

**Marketing Form Maintenance**

Forms: Test Form

---

**Form**

Description: Test Form

Title: Test

Sponsor Message: Brought to you by AMC Convergent IT and Zen Global Marketing

Table Percentage: 80%

Table Border: 0

Font: arial black    Font Size (%): 80%    Font Weight: Normal

Text Colour: None (Black)    Test Colours

Background Colour: Red

Top Left Image: None    Height: 0    Width: 0

Top Right Image: None    Height: 0    Width: 0

Bar Image: 2000.jpg    Height: 0    Width: 0

Background Image: None

Submit Image: 2000.jpg    Height: 0    Width: 0

Comment:

Save

- Make the required changes.

See *Marketing Form Maintenance* screen on page 73.

- Press Save.

The changes are saved.



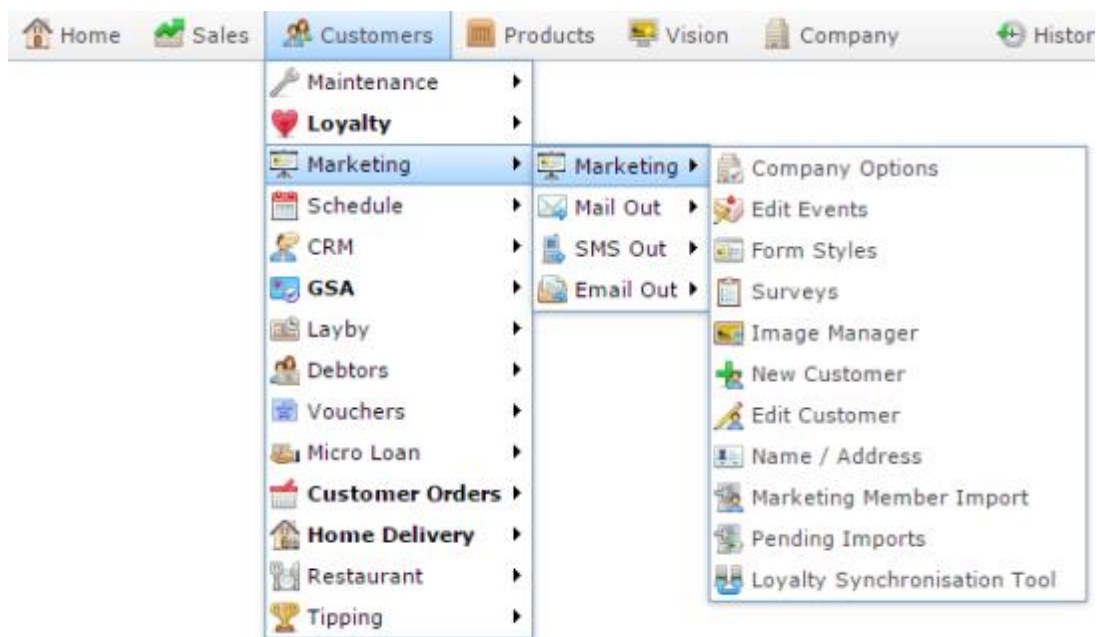
## Marketing Form Maintenance screen

Use this screen to create and edit form styles to use with marketing surveys.

### Opening the Marketing Form Maintenance screen













To open the Marketing Form Maintenance screen:

1. Press  Customers.
2. Press Marketing > Marketing > Form Styles.



The Marketing Form Default report is displayed.

Marketing Form Default Report

Name	ID	Image Top Left	Image Top Right	Image Backgr	Image Bar	Image Submit	Font	Font Weight	Table Width	Borders	User
Tasmar Devil	1						verdana	80	80%	0	Bob
Tree Survey	2						verdana	80	80%	0	Bob
Thirsty Camel	3						arial	80	80%	1	Les
Les Form	4						arial	80	80%	2	Les
Test Form	5						arial black	80	80%	0	Ben

Buttons: Add to Favourites, Create a Marketing Form

3. Press the Name of the form you want to edit.

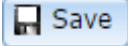
The Marketing Form Maintenance screen is displayed.

## Marketing Form Maintenance screen key fields and buttons

Field	Description
<b>Forms</b>	Select the form style to edit.
<b>Description</b>	Description of the form style.
<b>Title</b>	Title to appear at the top of the form.
<b>Sponsor Message</b>	Message displayed at the end of the form indicating who sponsored it.
<b>Table Percentage</b>	Percentage of the screen width the table should extend to.

Field	Description
<b>Table Border</b>	Select the border to use on the table.
<b>Font</b>	Select the font to use on the form.
<b>Font Size</b>	Select the size of font to use on the form.
<b>Font Weight</b>	Select the weight of font to use on the form. For example, <b>bold</b> or regular.
<b>Text Colour</b>	Select the colour to use for the text.
<b>Background Colour</b>	Select the colour of the form's background.
<b>Top Left Image / Height / Width</b>	Select the image to use in the top left of the form, and set the height and width to display the image.
<b>Top Right Image / Height / Width</b>	Select the image to use in the top right of the form, and set the height and width to display the image.
<b>Bar Image / Height / Width</b>	Select the image to use in the bar at the top of the form, and set the height and width to display the image.

---

Field	Description
<b>Background Image</b>	Select the image to use as the background.
<b>Submit Image / Height / Width</b>	Select the image to use as the submit button, and set the height and width to display the image.
<b>Comment</b>	Add any comment on the form style.
	Press to save your changes to the form style.

---

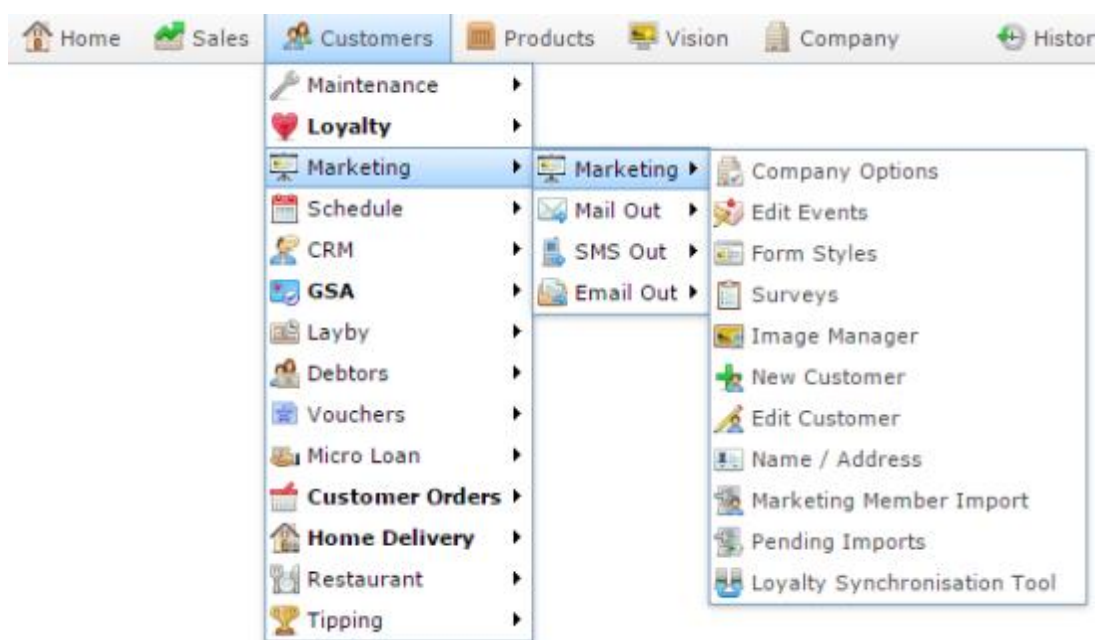
## Marketing Form Default report

Use the Marketing Form Default report to view the various styles available for forms.

### Opening the Marketing Form Default report

To open the Marketing Form Default report:

1. Press  Customers.
2. Press Marketing > Marketing > Form Styles.



The Marketing Form Default report is displayed.

Marketing Form Default Report

Name	ID	Image Top Left	Image Top Right	Image Backgr	Image Bar	Image Submit	Font	Font Weight	Table Width	Borders	User
Tasmar Devil	1						verdana	80	80%	0	Bob
Tree Survey	2						verdana	80	80%	0	Bob
Thirsty Camel	3						arial	80	80%	1	Les
Les Form	4						arial	80	80%	2	Les
Test Form	5						arial black	80	80%	0	Ben



Buttons: Add to Favourites, Create a Marketing Form

## Marketing Form Default report key fields

### Filters area

Use this area to filter the results shown in the report.

---

Field	Description
	Press to add this report to your Portal favourites for easier access.
	Press to create a new style for marketing forms.

---

## Report area

This area displays a summary of the settings of each style.

Field	Description
<b>Name</b>	The name of the form style
<b>ID</b>	Unique code identifying the form style.
<b>Image Top Left</b>	Image to be used in the top left of the form.
<b>Image Top Right</b>	Image to be used in the top right of the form.
<b>Image Background</b>	Image to be used as the background of the form.
<b>Image Bar</b>	Image to be used in the top bar of the form.
<b>Image Submit</b>	Image to be used for the submit button of the form.
<b>Font</b>	Font type to be used in the form.
<b>Font Weight</b>	Font weight to be used in the form.
<b>Table Width</b>	Width of the screen the form table should take.
<b>Borders</b>	Borders used on the side of the form.

Managing marketing and surveys

---

<b>Field</b>	<b>Description</b>
<b>User</b>	User who last edited the form.

---

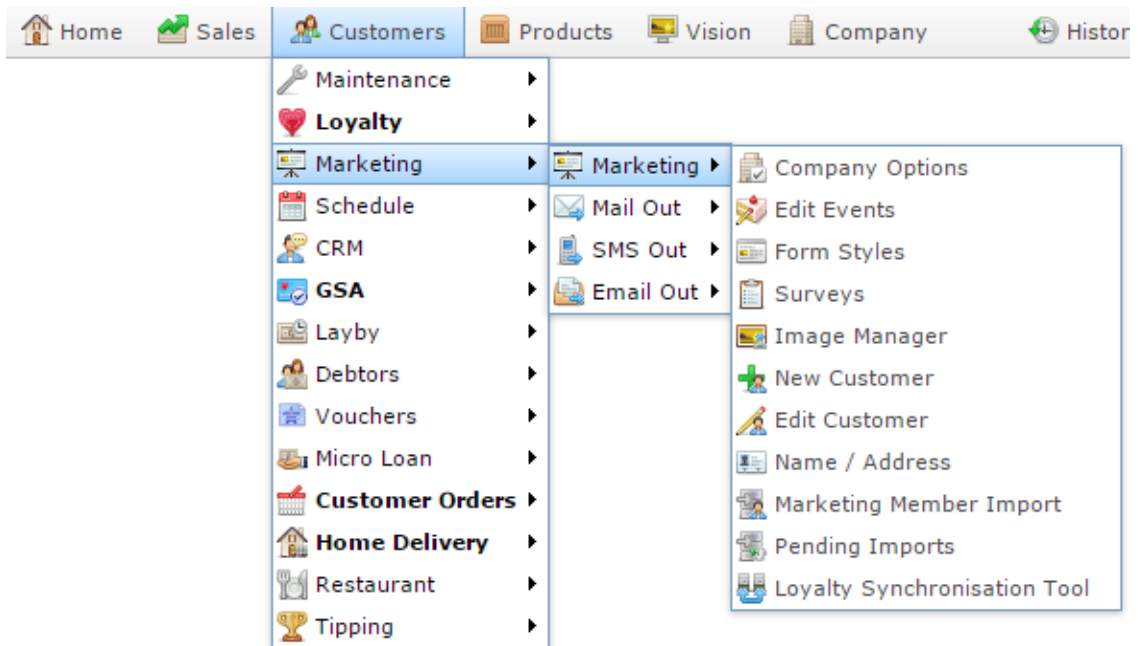


## Creating a new survey

Create a new survey to send questions to your marketing customers.

To create a new survey:

1. Press  Customers.
2. Press Marketing > Marketing > Surveys.



The Marketing Surveys report is displayed.

## Marketing Surveys

Descript	Survey #	Enabled	Question	Filters	Response	External Form	Created	Updated	Style	User
<a href="#">Bob Test Survey</a>	2	✓	8	0	13		06 MAY 2008	08 SEP 2009	Tree Survey	Bob
<a href="#">Clives Survey</a>	25	✓	1				11 MAY 2014	11 MAY 2014	Tasmani Devil	Clive
<a href="#">First Survey</a>	1	✓	3	0	7		05 MAY 2008	02 JUN 2008	Tasmani Devil	Bob
<a href="#">Gregs Test</a>	3	✓	3	0	3		09 MAY 2008	02 JUN 2008	Thirsty Camel	Les
<a href="#">Poste Code Survey</a>	6	✓	1		1		10 OCT 2008	10 OCT 2008	Les Form	Les
<a href="#">Survey</a>	5	✓	1		3		28 AUG 2008	28 AUG 2008	Test Form	Ben
<a href="#">Thirsty Camel Form</a>	4	✓	6	0	12	✓	25 MAY 2008	28 MAY 2008	None	Les

Add to Favourites

Create New Survey

Create New Survey

3. Press

The Marketing Survey Maintenance screen is displayed.

**Marketing Survey Maintenance**

Company: AMC Master

Survey Description: New

Details Questions

Survey: New Survey      Comments:

Description:

Include Name/Address: False

Enabled: False

External Form:

Form Style: None

Answers per row:

Multiselect Width:

Multiselect Elements Visible:

Update Delete

4. Select the survey you want to view from the **Survey** drop down list.

5. Type a description of the survey in the **Description** field.

6. Select a style to use for the survey in the **Form Style** drop-down field.

7. Press Update.

The survey is created. You can now add questions and answers.

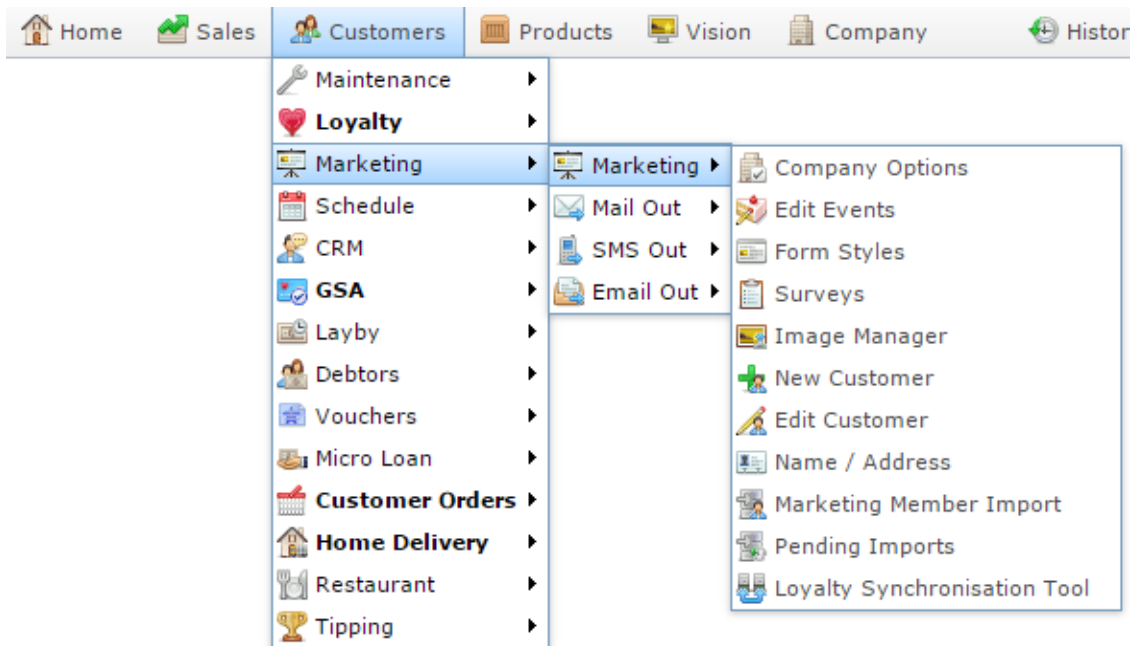
See *Creating a new question* on page 87.

## Editing a survey

Edit a survey to change its form style, add a comment, or make other changes.

To edit a survey:

1. Press  Customers.
2. Press Marketing > Marketing > Surveys.



The Marketing Surveys report is displayed.

## Marketing Surveys

Descript	Survey #	Enabled	Question	Filters	Response	External Form	Created	Updated	Style	User
<a href="#">Bob Test Survey</a>	2	✓	8	0	13		06 MAY 2008	08 SEP 2009	Tree Survey	Bob
<a href="#">Clives Survey</a>	25	✓	1				11 MAY 2014	11 MAY 2014	Tasmani Devil	Clive
<a href="#">First Survey</a>	1	✓	3	0	7		05 MAY 2008	02 JUN 2008	Tasmani Devil	Bob
<a href="#">Gregs Test</a>	3	✓	3	0	3		09 MAY 2008	02 JUN 2008	Thirsty Camel	Les
<a href="#">Poste Code Survey</a>	6	✓	1		1		10 OCT 2008	10 OCT 2008	Les Form	Les
<a href="#">Survey</a>	5	✓	1		3		28 AUG 2008	28 AUG 2008	Test Form	Ben
<a href="#">Thirsty Camel Form</a>	4	✓	6	0	12	✓	25 MAY 2008	28 MAY 2008	None	Les

Add to Favourites

Create New Survey

Create New Survey

3. Press

The Marketing Survey Maintenance screen is displayed.

**Marketing Survey Maintenance**

Company: AMC Master

Survey Description: New

Details Questions

Survey: New Survey Comments:

Description:

Include Name/Address: False

Enabled: False

External Form:

Form Style: None

Answers per row:

Multiselect Width:

Multiselect Elements Visible:

Update Delete

4. Select the survey you want to view from the **Survey** drop down list.
5. Make the required changes.

See *Marketing Survey Maintenance* screen on page 110.

6. Press

Update

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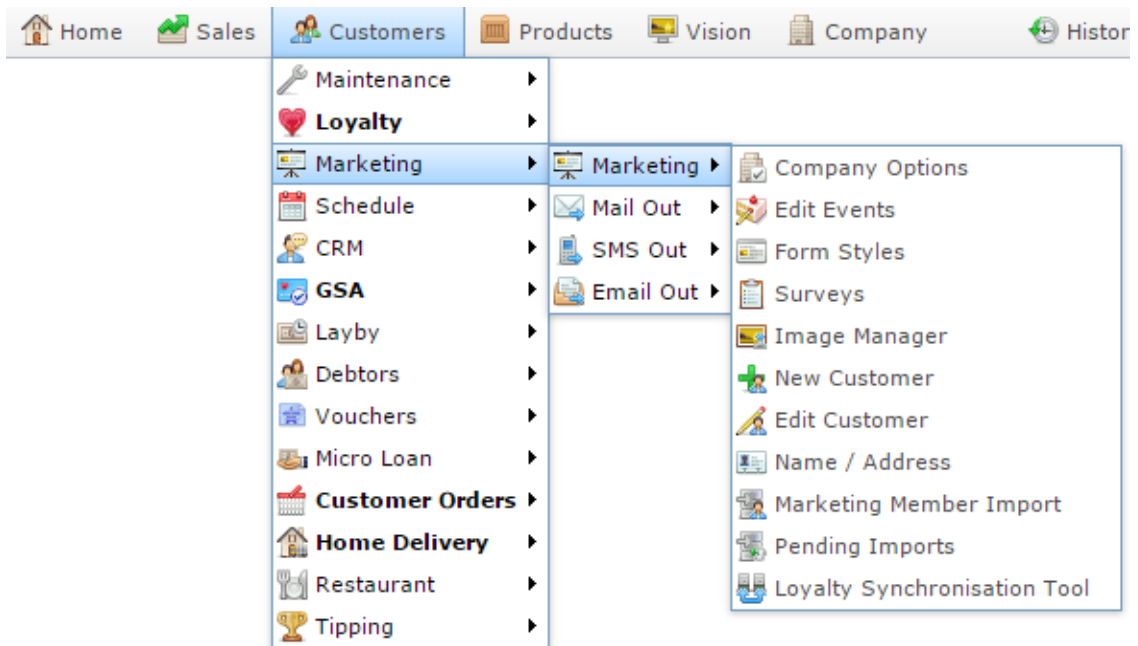
The survey is saved.

## Creating a new question

Create a question to add it to your survey.

To create a new question:

1. Press  Customers.
2. Press Marketing > Marketing > Surveys.



The Marketing Surveys report is displayed.

## Marketing Surveys

Descript	Survey #	Enabled	Question	Filters	Response	External Form	Created	Updated	Style	User
<a href="#">Bob Test Survey</a>	2	✓	8	0	13		06 MAY 2008	08 SEP 2009	Tree Survey	Bob
<a href="#">Clives Survey</a>	25	✓	1				11 MAY 2014	11 MAY 2014	Tasmani Devil	Clive
<a href="#">First Survey</a>	1	✓	3	0	7		05 MAY 2008	02 JUN 2008	Tasmani Devil	Bob
<a href="#">Gregs Test</a>	3	✓	3	0	3		09 MAY 2008	02 JUN 2008	Thirsty Camel	Les
<a href="#">Poste Code Survey</a>	6	✓	1		1		10 OCT 2008	10 OCT 2008	Les Form	Les
<a href="#">Survey</a>	5	✓	1		3		28 AUG 2008	28 AUG 2008	Test Form	Ben
<a href="#">Thirsty Camel Form</a>	4	✓	6	0	12	✓	25 MAY 2008	28 MAY 2008	None	Les

Add to Favourites

Create New Survey

Create New Survey

3. Press

The Marketing Survey Maintenance screen is displayed.

**Marketing Survey Maintenance**

Company: AMC Master

Survey Description: New

Details Questions

Survey: New Survey      Comments:

Description:

Include Name/Address: False

Enabled: False

External Form:

Form Style: None

Answers per row:

Multiselect Width:

Multiselect Elements Visible:

4. Select the survey you want to view from the Survey drop down list.

5. Press the Questions tab.



**Marketing Survey Maintenance**

Company:

Survey Description: Test Survey

Details Questions

Question	Quest #	Order	Enabled	Compulsory	Type	Elements
<a href="#">Create Question</a>						
How did you hear	3	0	✓		Multi Choice	1
Have you shopped	1	1	✓	✓	True / False	1
How often do you	2	2	✓		Multi Choice	3

6. Press the **Create Question** field.

The Marketing Survey Question Maintenance screen is displayed.

**Marketing Survey Question Maintenance**

Company:  Comments:

Survey Description: Test Survey

ID:

Question:

Enabled:

Compulsory:

Question Type:

Question Order:

Answers1: True  
Answer 2: False

7. Type a description of the survey in the **Description** field.
8. Type the question in the **Question** field.
9. Select the type of question you want to ask from the **Question Type** drop-down field.
10. Press .

The question is created. You can now add answers.

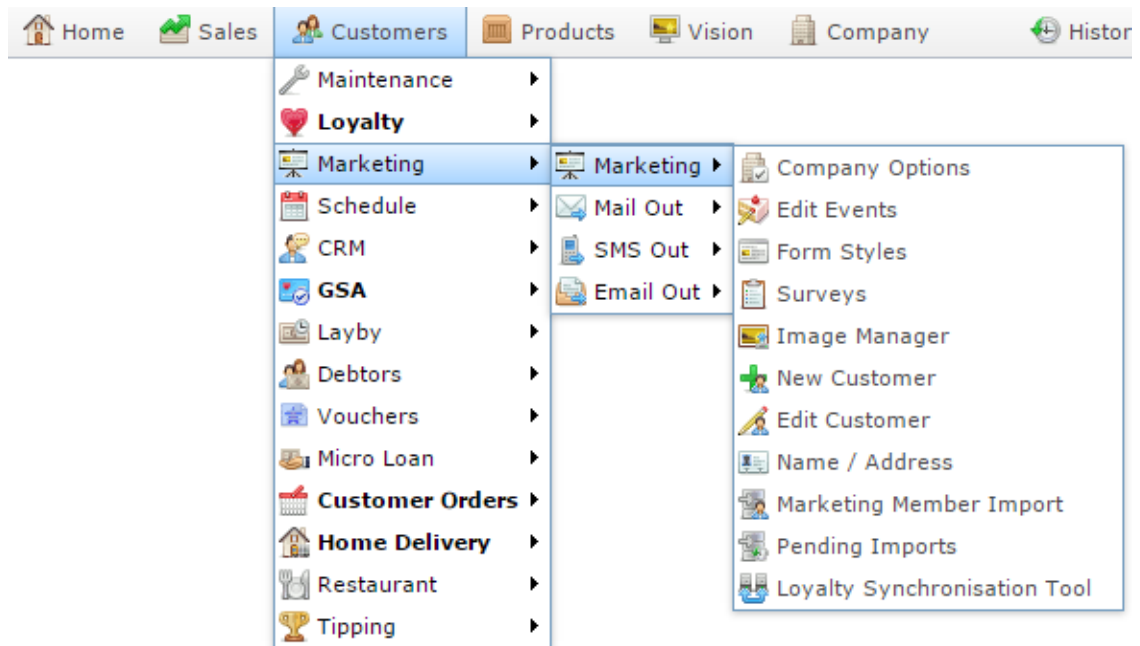
See *Creating a new answer* on page 93.

## Edit a question

Edit a question to change its answer type or rephrase it.

To edit a question:

1. Press  Customers.
2. Press [Marketing > Marketing > Surveys](#).



The Marketing Surveys report is displayed.

## Marketing Surveys

Descript	Survey #	Enabled	Question	Filters	Response	External Form	Created	Updated	Style	User
<a href="#">Bob Test Survey</a>	2	✓	8	0	13		06 MAY 2008	08 SEP 2009	Tree Survey	Bob
<a href="#">Clives Survey</a>	25	✓	1				11 MAY 2014	11 MAY 2014	Tasmani Devil	Clive
<a href="#">First Survey</a>	1	✓	3	0	7		05 MAY 2008	02 JUN 2008	Tasmani Devil	Bob
<a href="#">Gregs Test</a>	3	✓	3	0	3		09 MAY 2008	02 JUN 2008	Thirsty Camel	Les
<a href="#">Poste Code Survey</a>	6	✓	1		1		10 OCT 2008	10 OCT 2008	Les Form	Les
<a href="#">Survey</a>	5	✓	1		3		28 AUG 2008	28 AUG 2008	Test Form	Ben
<a href="#">Thirsty Camel Form</a>	4	✓	6	0	12	✓	25 MAY 2008	28 MAY 2008	None	Les

Add to Favourites

Create New Survey

Create New Survey

3. Press

The Marketing Survey Maintenance screen is displayed.

**Marketing Survey Maintenance**

Company: AMC Master

Survey Description: New

Details Questions

Survey: New Survey      Comments:

Description:

Include Name/Address: False

Enabled: False

External Form:

Form Style: None

Answers per row:

Multiselect Width:

Multiselect Elements Visible:

Update Delete

4. Select the survey you want to view from the Survey drop down list.

5. Press the Questions tab.

**Marketing Survey Maintenance**

Company: AMC Master

Survey Description: Test Survey

Details Questions

Question	Quest #	Order	Enabled	Compulsory	Type	Elements
<a href="#">Create Question</a>						
How did you hear	3	0	✓		Multi Choice	1
Have you shopped	1	1	✓	✓	True / False	1
How often do you	2	2	✓		Multi Choice	3

Update Delete

- Press the **Question** field of the question you want to edit.

The Marketing Survey Question Maintenance screen is displayed.

**Marketing Survey Question Maintenance**

Company: AMC Master

Survey Description: Test Survey

Comments:

ID: How did you hear about our service?

Question: How did you hear about our service?

Enabled: True

Compulsory: False

Question Type: Multiple Choice

Question Order: 0

[Add / Edit Answers](#)

Update Question Delete Question

- Make the required changes.

See *Marketing Survey Question Maintenance* screen on page 117.

- Press **Update Question**.

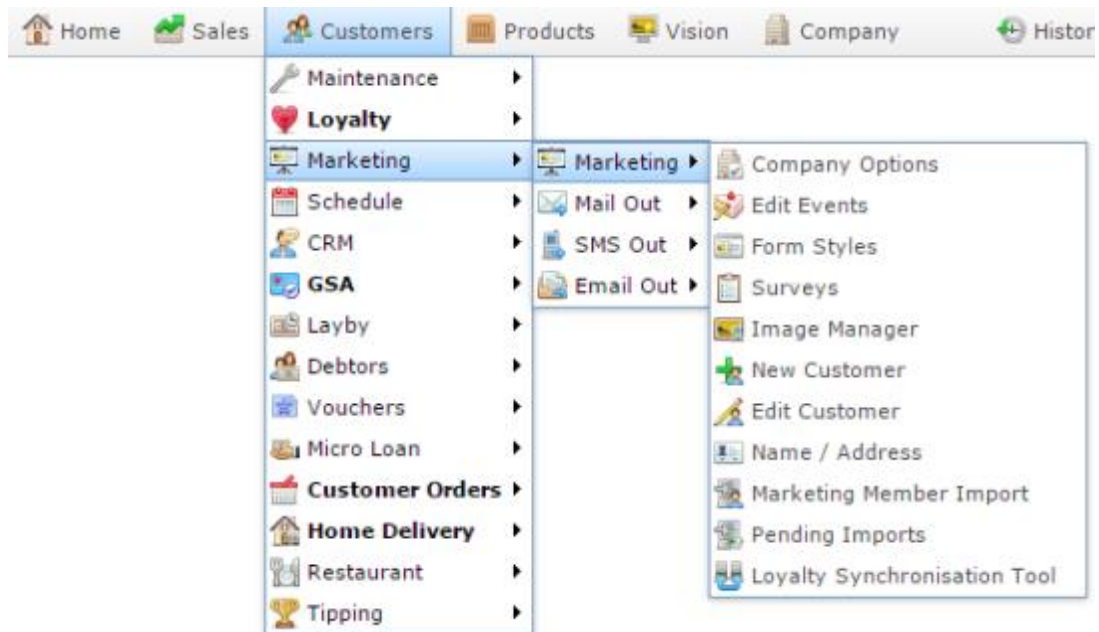
The question is saved.

## Creating a new answer

Create answers to questions for your customers to select.

To create a new answer:

1. Press  Customers.
2. Press Marketing > Marketing > Surveys.



The Marketing Surveys report is displayed.

### Marketing Surveys

Descript	Survey #	Enabled	Question	Filters	Response	External Form	Created	Updated	Style	User
<a href="#">Bob Test Survey</a>	2	✓	8	0	13		06 MAY 2008	08 SEP 2009	Tree Survey	Bob
<a href="#">Clives Survey</a>	25	✓	1				11 MAY 2014	11 MAY 2014	Tasmani Devil	Clive
<a href="#">First Survey</a>	1	✓	3	0	7		05 MAY 2008	02 JUN 2008	Tasmani Devil	Bob
<a href="#">Greps Test</a>	3	✓	3	0	3		09 MAY 2008	02 JUN 2008	Thirsty Camel	Les
<a href="#">Poste Code Survey</a>	6	✓	1		1		10 OCT 2008	10 OCT 2008	Les Form	Les
<a href="#">Survey</a>	5	✓	1		3		28 AUG 2008	28 AUG 2008	Test Form	Ben
<a href="#">Thirsty Camel Form</a>	4	✓	6	0	12	✓	25 MAY 2008	28 MAY 2008	None	Les

Add to Favourites
Create New Survey

Create New Survey

3. Press

The Marketing Survey Maintenance screen is displayed.

**Marketing Survey Maintenance**

Company: AMC Master

Survey Description: New

Details Questions

Survey: New Survey ▼      Comments:

Description:

Include Name/Address: False ▼

Enabled: False ▼

External Form:

Form Style: None ▼

Answers per row:

Multiselect Width:

Multiselect Elements Visible:

Update   Delete

4. Select the survey you want to view from the **Survey** drop down list.

5. Press the **Questions** tab.

**Marketing Survey Maintenance**

Company: AMC Master

Survey Description: Test Survey

Details Questions

Question	Quest #	Order	Enabled	Compulsory	Type	Elements
<a href="#">Create Question</a>						
How did you hear	3	0	✓		Multi Choice	1
Have you shopped	1	1	✓	✓	True / False	1
How often do you	2	2	✓		Multi Choice	3

Update Delete

6. Press the [Question](#) field of the question you want to edit.

The Marketing Survey Question Maintenance screen is displayed.

**Marketing Survey Question Maintenance**

Company: AMC Master

Survey Description: Test Survey

Comments:

ID: How did you hear about o

Question: How did you hear about our service?

Enabled: True

Compulsory: False

Question Type: Multiple Choice

Question Order: 0

[Show/Add / Edit Answers](#)

Update Question Delete Question

7. Press [Add / Edit Answers](#).

The Marketing Survey Question Answer Maintenance screen is displayed.

**Marketing Survey Question Answer Maintenance**

Company: AMC Master

Survey Description: Test Survey [26]

Survey Question: How often do you shop with us? [2]

Survey Question Type: Multiple Choice

ID: New Answer

Answer:

Enabled: True

Answer Order:

Update Answer Delete Answer

8. Select [New Answer](#) in the ID drop-down field.

9. Type the text of the answer in the [Answer](#) field.

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10. Press .

The answer is created.

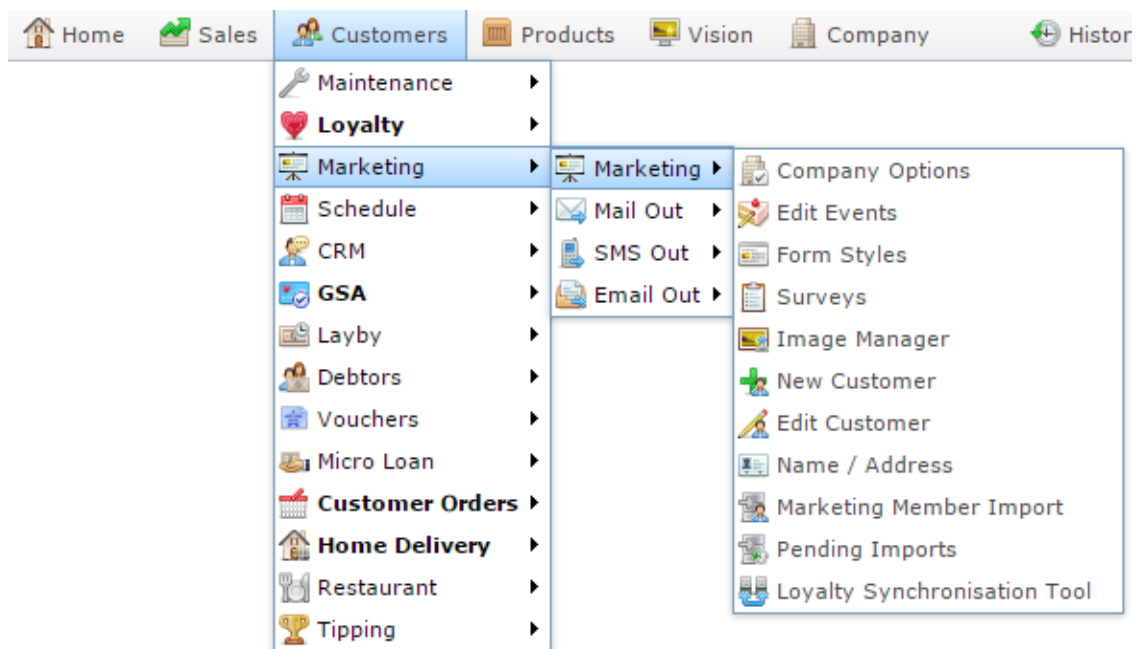


## Editing an answer

Edit a question's answer to rephrase it or put it in a different order.

To edit an answer:

1. Press  Customers.
2. Press Marketing > Marketing > Surveys.



The Marketing Surveys report is displayed.

## Marketing Surveys

Descript	Survey #	Enabled	Question	Filters	Response	External Form	Created	Updated	Style	User
<a href="#">Bob Test Survey</a>	2	✓	8	0	13		06 MAY 2008	08 SEP 2009	Tree Survey	Bob
<a href="#">Clives Survey</a>	25	✓	1				11 MAY 2014	11 MAY 2014	Tasmani Devil	Clive
<a href="#">First Survey</a>	1	✓	3	0	7		05 MAY 2008	02 JUN 2008	Tasmani Devil	Bob
<a href="#">Gregs Test</a>	3	✓	3	0	3		09 MAY 2008	02 JUN 2008	Thirsty Camel	Les
<a href="#">Poste Code Survey</a>	6	✓	1		1		10 OCT 2008	10 OCT 2008	Les Form	Les
<a href="#">Survey</a>	5	✓	1		3		28 AUG 2008	28 AUG 2008	Test Form	Ben
<a href="#">Thirsty Camel Form</a>	4	✓	6	0	12	✓	25 MAY 2008	28 MAY 2008	None	Les

Add to Favourites

Create New Survey

Create New Survey

3. Press

The Marketing Survey Maintenance screen is displayed.

**Marketing Survey Maintenance**

Company: AMC Master

Survey Description: New

Details Questions

Survey: New Survey Comments:

Description:

Include Name/Address: False

Enabled: False

External Form:

Form Style: None

Answers per row:

Multiselect Width:

Multiselect Elements Visible:

Update Delete

4. Select the survey you want to view from the Survey drop down list.

5. Press the Questions tab.

**Marketing Survey Maintenance**

Company: AMC Master

Survey Description: Test Survey

Details Questions

Question	Quest #	Order	Enabled	Compulsory	Type	Elements
<a href="#">Create Question</a>						
How did you hear	3	0	✓		Multi Choice	1
Have you shopped	1	1	✓	✓	True / False	1
How often do you	2	2	✓		Multi Choice	3

[Update](#) [Delete](#)

- Press the **Question** field of the question you want to edit.

The Marketing Survey Question Maintenance screen is displayed.

**Marketing Survey Question Maintenance**

Company: AMC Master

Survey Description: Test Survey

Comments:

ID: How did you hear about our service?

Question: How did you hear about our service?

Enabled: True

Compulsory: False

Question Type: Multiple Choice

Question Order: 0

[Answers Add / Edit Answers](#)

[Update Question](#) [Delete Question](#)

- Press **Add / Edit Answers**.

The Marketing Survey Question Answer Maintenance screen is displayed.

**Marketing Survey Question Answer Maintenance**

Company: AMC Master

Survey Description: Test Survey [26]

Survey Question: How often do you shop with us? [2]

Survey Question Type: Multiple Choice

ID: New Answer

Answer:

Enabled: True

Answer Order:

[Update Answer](#) [Delete Answer](#)

- Select the answer you want to edit from the **ID** drop-down field.
- Make the required changes.

Managing marketing and surveys

See *Marketing Survey Question Answer Maintenance* screen on page 122.

10. Press .

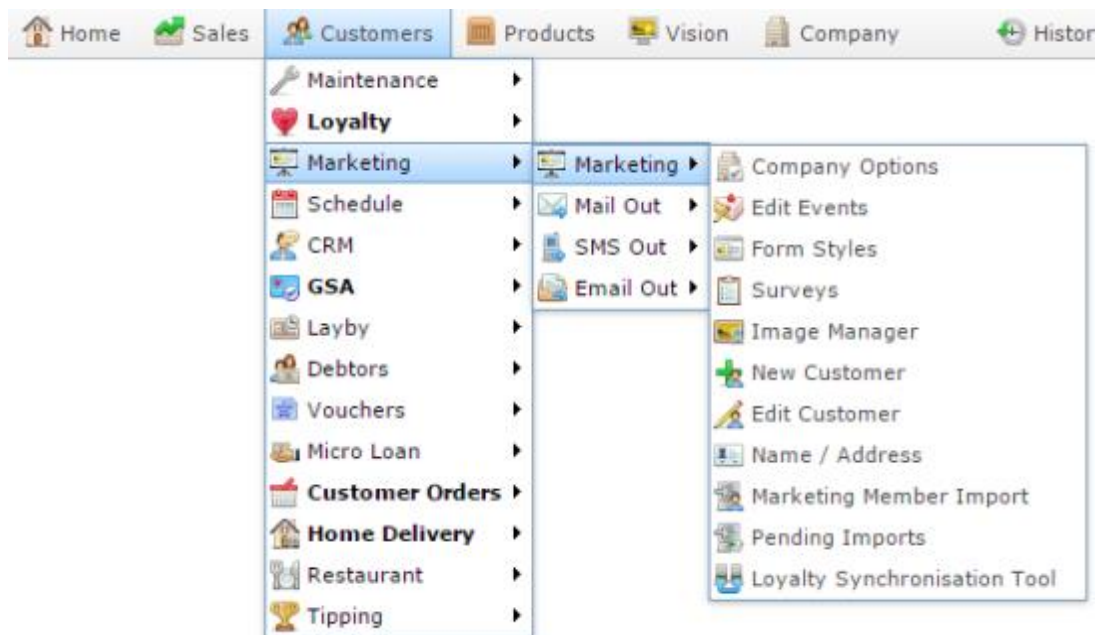
The answer is saved.

## Deleting an answer

Delete an answer to remove it from the possible answers customers can select for this question.

To delete an answer:

1. Press  Customers.
2. Press **Marketing > Marketing > Surveys**.



The Marketing Surveys report is displayed.

### Marketing Surveys

Descript	Survey #	Enabled	Question	Filters	Response	External Form	Created	Updated	Style	User
<a href="#">Bob Test Survey</a>	2	✓	8	0	13		06 MAY 2008	08 SEP 2009	Tree Survey	Bob
<a href="#">Clives Survey</a>	25	✓	1				11 MAY 2014	11 MAY 2014	Tasmani Devil	Clive
<a href="#">First Survey</a>	1	✓	3	0	7		05 MAY 2008	02 JUN 2008	Tasmani Devil	Bob
<a href="#">Greps Test</a>	3	✓	3	0	3		09 MAY 2008	02 JUN 2008	Thirsty Camel	Les
<a href="#">Poste Code Survey</a>	6	✓	1		1		10 OCT 2008	10 OCT 2008	Les Form	Les
<a href="#">Survey</a>	5	✓	1		3		28 AUG 2008	28 AUG 2008	Test Form	Ben
<a href="#">Thirsty Camel Form</a>	4	✓	6	0	12	✓	25 MAY 2008	28 MAY 2008	None	Les

Add to Favourites
Create New Survey

Create New Survey

3. Press

The Marketing Survey Maintenance screen is displayed.

**Marketing Survey Maintenance**

Company: AMC Master

Survey Description: New

Details
Questions

Survey: New Survey Comments:

Description:

Include Name/Address: False

Enabled: False

External Form:

Form Style: None

Answers per row:

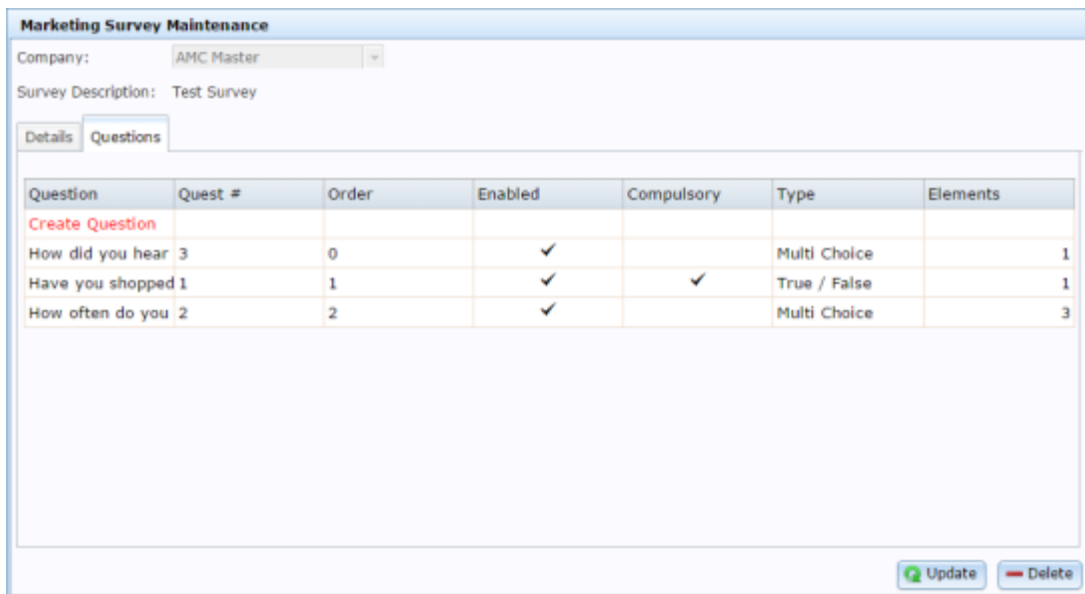
Multiselect Width:

Multiselect Elements Visible:

Update
Delete

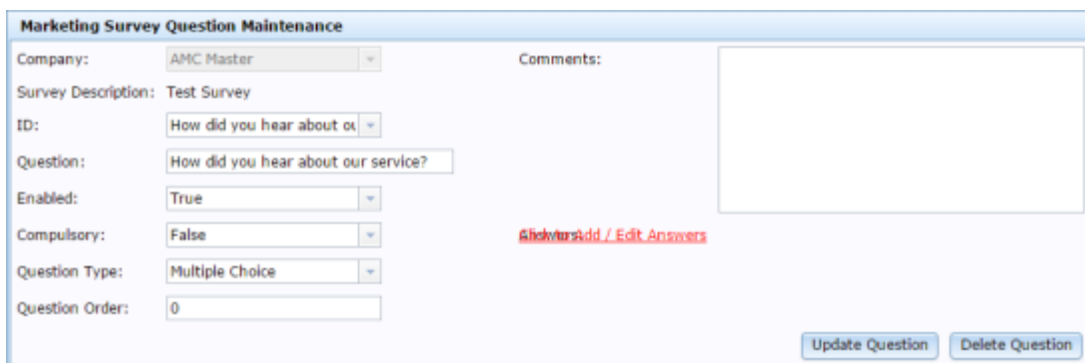
4. Select the survey you want to view from the **Survey** drop down list.

5. Press the **Questions** tab.



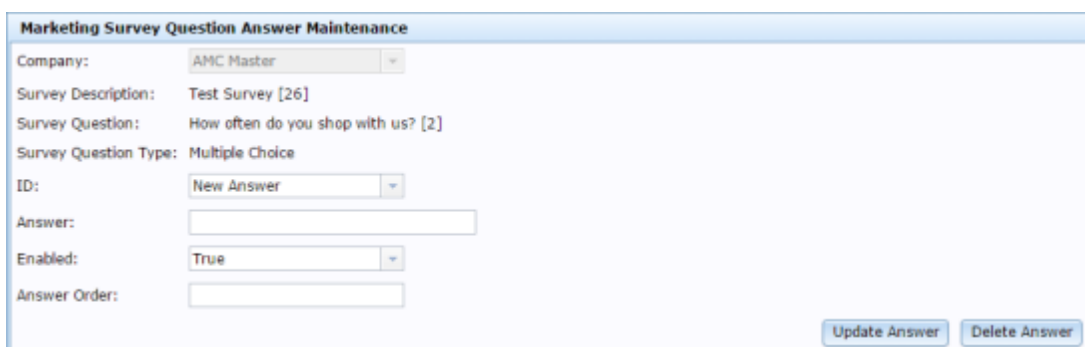
6. Press the **Question** field of the question you want to edit.

The Marketing Survey Question Maintenance screen is displayed.



7. Press **Add / Edit Answers**.

The Marketing Survey Question Answer Maintenance screen is displayed.



8. Select the answer you want to delete from the **ID** drop-down field.

9. Press **Delete Answer**.

Managing marketing and surveys

The answer is deleted.

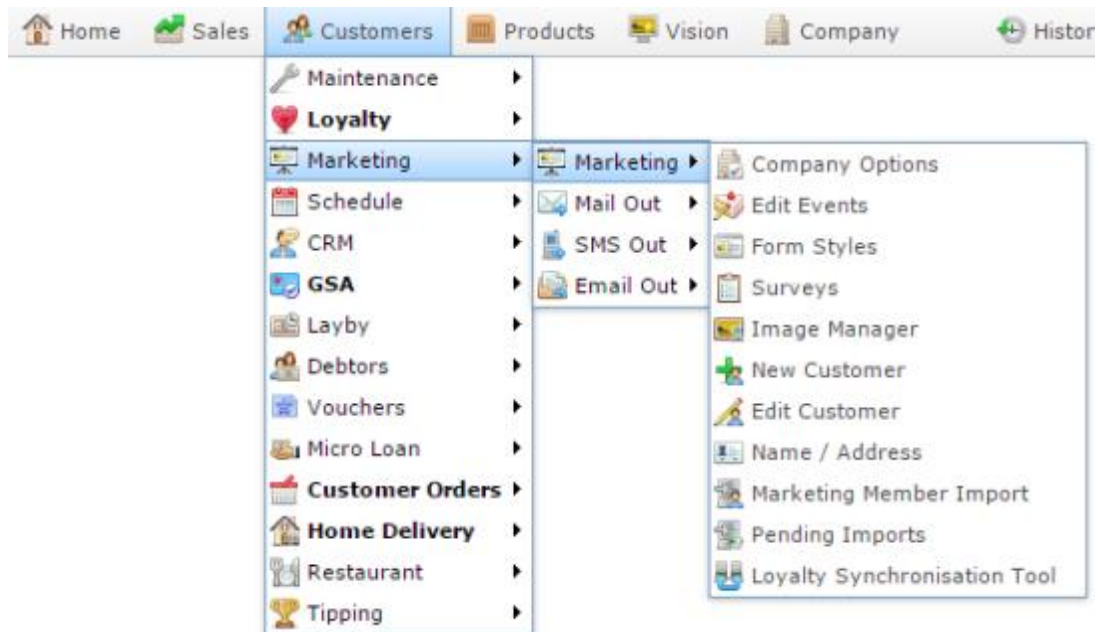


## Deleting a question

Delete a question to remove it from the survey. All answers will also be deleted.

To delete a question:

1. Press  Customers.
2. Press Marketing > Marketing > Surveys.



The Marketing Surveys report is displayed.

### Marketing Surveys

Descript	Survey #	Enabled	Question	Filters	Response	External Form	Created	Updated	Style	User
<a href="#">Bob Test Survey</a>	2	✓	8	0	13		06 MAY 2008	08 SEP 2009	Tree Survey	Bob
<a href="#">Clives Survey</a>	25	✓	1				11 MAY 2014	11 MAY 2014	Tasmani Devil	Clive
<a href="#">First Survey</a>	1	✓	3	0	7		05 MAY 2008	02 JUN 2008	Tasmani Devil	Bob
<a href="#">Greps Test</a>	3	✓	3	0	3		09 MAY 2008	02 JUN 2008	Thirsty Camel	Les
<a href="#">Poste Code Survey</a>	6	✓	1		1		10 OCT 2008	10 OCT 2008	Les Form	Les
<a href="#">Survey</a>	5	✓	1		3		28 AUG 2008	28 AUG 2008	Test Form	Ben
<a href="#">Thirsty Camel Form</a>	4	✓	6	0	12	✓	25 MAY 2008	28 MAY 2008	None	Les

Add to Favourites
Create New Survey

Create New Survey

3. Press

The Marketing Survey Maintenance screen is displayed.

**Marketing Survey Maintenance**

Company: AMC Master

Survey Description: New

Details
Questions

Survey: New Survey Comments:

Description:

Include Name/Address: False

Enabled: False

External Form:

Form Style: None

Answers per row:

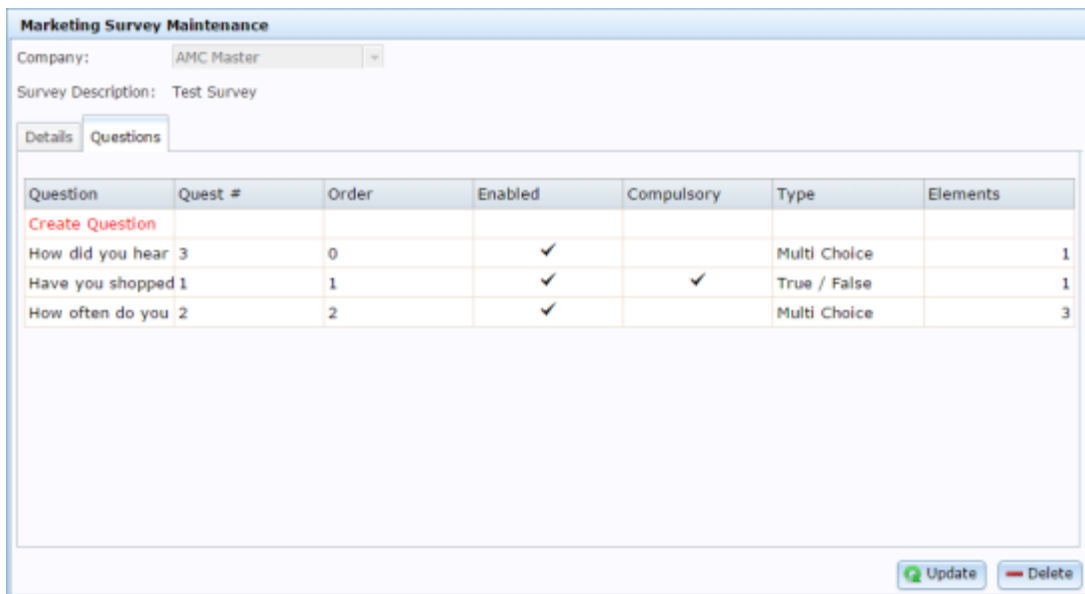
Multiselect Width:

Multiselect Elements Visible:

Update
Delete

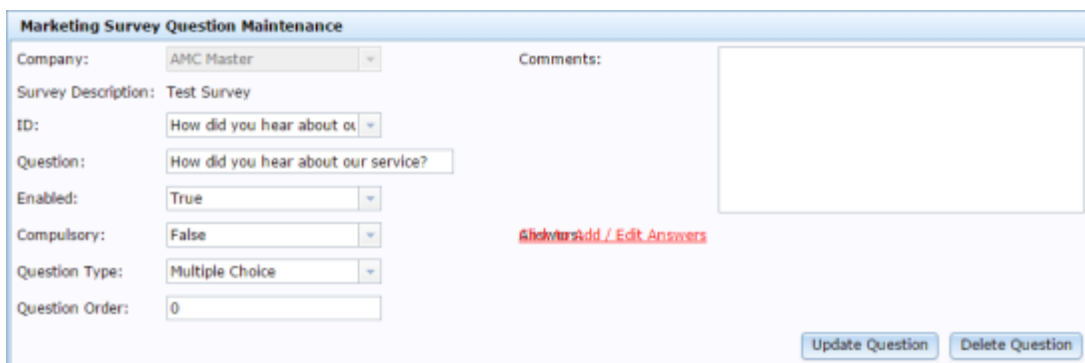
4. Select the survey you want to view from the [Survey](#) drop down list.

5. Press the Questions tab.



6. Press the **Question** field of the question you want to edit.

The Marketing Survey Question Maintenance screen is displayed.



7. Press **Delete Question**.

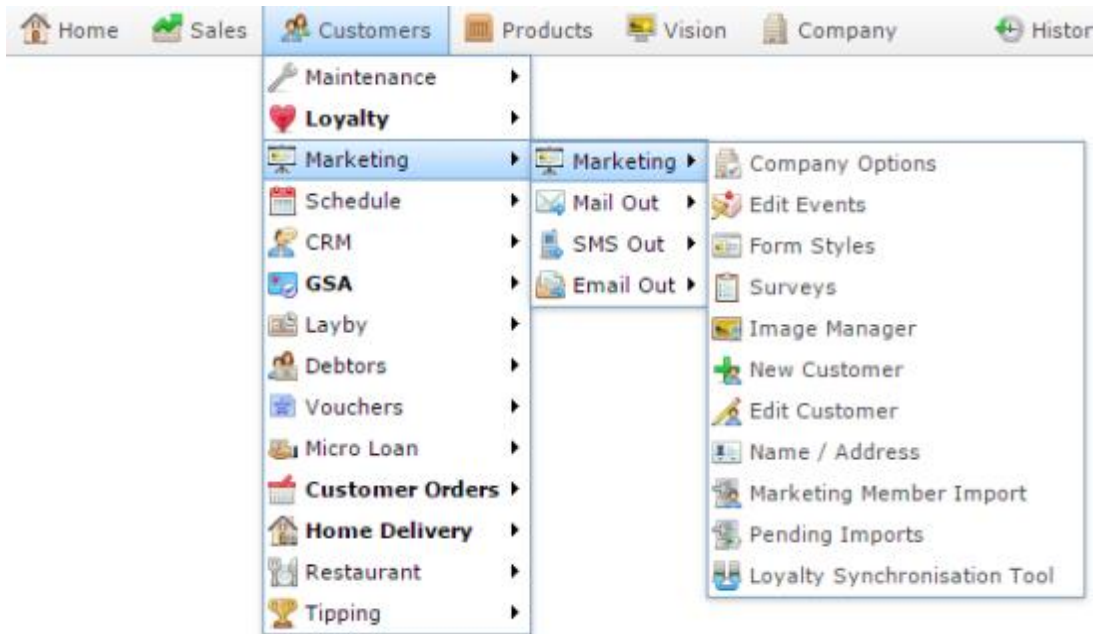
The question is deleted.

## Deleting a survey

Delete a survey to remove it from the portal. All questions and answers it contains are also deleted.

To delete a survey:

1. Press  Customers.
2. Press **Marketing > Marketing > Surveys**.



The Marketing Surveys report is displayed.

### Marketing Surveys

Descript	Survey #	Enabled	Questions	Filters	Response	External Form	Created	Updated	Style	User
<a href="#">Bob Test Survey</a>	2	✓	8	0	13		06 MAY 2008	08 SEP 2009	Tree Survey	Bob
<a href="#">Clives Survey</a>	25	✓	1				11 MAY 2014	11 MAY 2014	Tasmani Devil	Clive
<a href="#">First Survey</a>	1	✓	3	0	7		05 MAY 2008	02 JUN 2008	Tasmani Devil	Bob
<a href="#">Greps Test</a>	3	✓	3	0	3		09 MAY 2008	02 JUN 2008	Thirsty Camel	Les
<a href="#">Poste Code Survey</a>	6	✓	1		1		10 OCT 2008	10 OCT 2008	Les Form	Les
<a href="#">Survey</a>	5	✓	1		3		28 AUG 2008	28 AUG 2008	Test Form	Ben
<a href="#">Thirsty Camel Form</a>	4	✓	6	0	12	✓	25 MAY 2008	28 MAY 2008	None	Les

Add to Favourites

Create New Survey

Create New Survey

3. Press

The Marketing Survey Maintenance screen is displayed.

**Marketing Survey Maintenance**

Company: AMC Master

Survey Description: New

Details Questions

Survey: New Survey Comments:

Description:

Include Name/Address: False

Enabled: False

External Form:

Form Style: None

Answers per row:

Multiselect Width:

Multiselect Elements Visible:

Update Delete

4. Select the survey you want to view from the **Survey** drop down list.

5. Press Delete.

The survey is deleted.

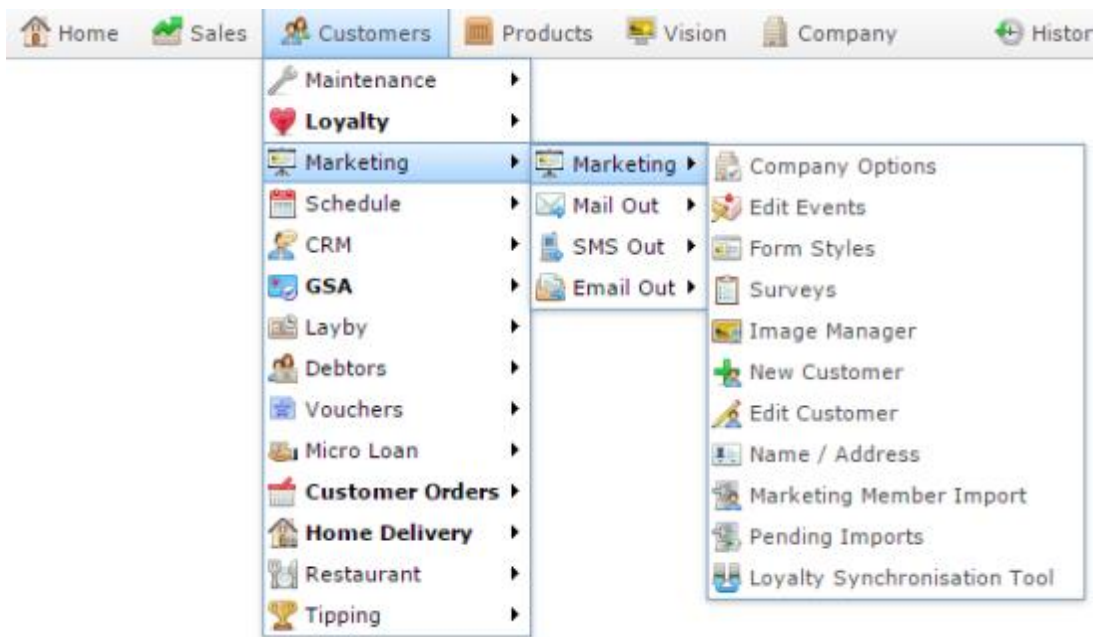
## Marketing Survey Maintenance screen

Use this screen to create and maintain surveys and their questions.

### Opening the Marketing Survey Maintenance screen

To open the Marketing Survey Maintenance screen:

1. Press  Customers.
2. Press Marketing > Marketing > Surveys.



The Marketing Surveys report is displayed.

### Marketing Surveys

Descript	Survey #	Enabled	Question	Filters	Response	External Form	Created	Updated	Style	User
<a href="#">Bob Test Survey</a>	2	✓	8	0	13		06 MAY 2008	08 SEP 2009	Tree Survey	Bob
<a href="#">Clives Survey</a>	25	✓	1				11 MAY 2014	11 MAY 2014	Tasmani Devil	Clive
<a href="#">First Survey</a>	1	✓	3	0	7		05 MAY 2008	02 JUN 2008	Tasmani Devil	Bob
<a href="#">Greps Test</a>	3	✓	3	0	3		09 MAY 2008	02 JUN 2008	Thirsty Camel	Les
<a href="#">Poste Code Survey</a>	6	✓	1		1		10 OCT 2008	10 OCT 2008	Les Form	Les
<a href="#">Survey</a>	5	✓	1		3		28 AUG 2008	28 AUG 2008	Test Form	Ben
<a href="#">Thirsty Camel Form</a>	4	✓	6	0	12	✓	25 MAY 2008	28 MAY 2008	None	Les

Add to Favourites

Create New Survey

Create New Survey

3. Press

The Marketing Survey Maintenance screen is displayed.

**Marketing Survey Maintenance**

Company: AMC Master

Survey Description: New

Details
Questions

Survey: New Survey Comments:

Description:

Include Name/Address: False

Enabled: False

External Form:

Form Style: None

Answers per row:

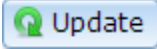
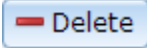
Multiselect Width:

Multiselect Elements Visible:

Update
Delete

## Marketing Survey Maintenance screen key fields and buttons

### Common fields and buttons

Field	Description
<b>Company</b>	The company the survey belongs to.
<b>Survey Description</b>	Description identifying the survey.
	Save any changes made to this survey.
	Delete this survey.



## Details tab

Use this area to control how the survey is displayed.

The screenshot shows the 'Marketing Survey Maintenance' window with the 'Details' tab selected. The 'Company' is set to 'AMC Master' and the 'Survey Description' is 'New'. The 'Survey' dropdown is set to 'New Survey'. Other fields include 'Description', 'Include Name/Address' (False), 'Enabled' (False), 'External Form', 'Form Style' (None), 'Answers per row', 'Multiselect Width', and 'Multiselect Elements Visible'. A 'Comments' text area is on the right. 'Update' and 'Delete' buttons are at the bottom right.

Field	Description
<b>Survey</b>	Select the survey to edit, or <a href="#">New Survey</a> to create a new survey.
<b>Description</b>	Description of the survey.
<b>Include Name / Address</b>	Select whether to include survey respondent's names and addresses.
<b>Enabled</b>	Select whether this survey is enabled on the Portal.
<b>External Form</b>	Type the URL of an external survey form this survey uses.

<b>Field</b>	<b>Description</b>
<b>Form Style</b>	Select the form style that controls how the survey looks. <div style="border: 1px solid #4a7ebb; background-color: #d9e1f2; padding: 5px;"><b>Note:</b> This only applies for surveys that do not use external forms.</div>
<b>Created</b>	Date the survey was created.
<b>Changed</b>	Date the survey was last changed.
<b>Answers per row</b>	Type the number of answer options that should be displayed per row.
<b>Multiselect Width</b>	Type the number of pixels the multiple select answer options should be.
<b>Multiselect Elements Visible</b>	Type how many elements should be visible in multiple select questions.
<b>Comments</b>	Type any comment referring to this survey.

## Question tab

Use this area to add, edit and delete questions from the survey.

**Marketing Survey Maintenance**

Company: AMC Master

Survey Description: Test Survey

Details Questions

Question	Quest #	Order	Enabled	Compulsory	Type	Elements
<a href="#">Create Question</a>						
How did you hear	3	0	✓		Multi Choice	1
Have you shopped	1	1	✓	✓	True / False	1
How often do you	2	2	✓		Multi Choice	3

Update Delete

### Field

### Description

#### Question

Title of the question.

#### Quest #

Unique code identifying the question in this survey.

#### Order

Order the question appears on the survey. 0 appears first.

#### Enabled

Indicates whether the question appears on the survey.

#### Compulsory

Indicates if the question must be answered to complete the survey.

#### Type

The type of question.

---

<b>Field</b>	<b>Description</b>
<b>Elements</b>	The number of elements the question contains, such as the number of answers.

---

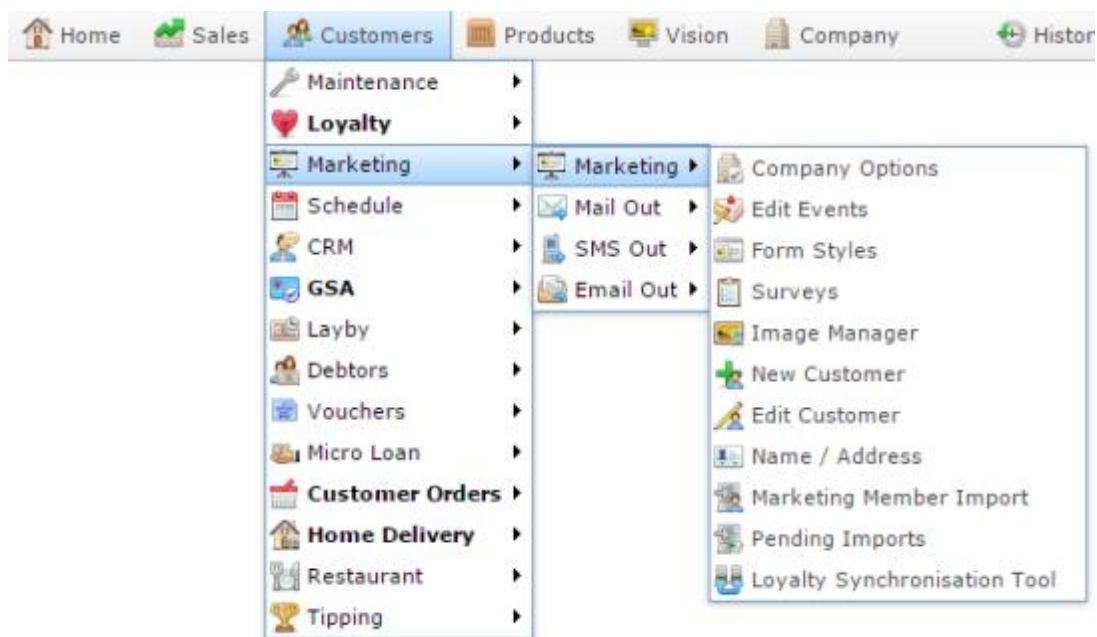
## Marketing Survey Question Maintenance screen

Use this screen to maintain questions within a survey.

### Opening the Marketing Survey Question Maintenance screen

To open the Marketing Survey Question Maintenance screen:

1. Press  Customers.
2. Press Marketing > Marketing > Surveys.



The Marketing Surveys report is displayed.

### Marketing Surveys

Descript	Survey #	Enabled	Question	Filters	Response	External Form	Created	Updated	Style	User
<a href="#">Bob Test Survey</a>	2	✓	8	0	13		06 MAY 2008	08 SEP 2009	Tree Survey	Bob
<a href="#">Clives Survey</a>	25	✓	1				11 MAY 2014	11 MAY 2014	Tasmani Devil	Clive
<a href="#">First Survey</a>	1	✓	3	0	7		05 MAY 2008	02 JUN 2008	Tasmani Devil	Bob
<a href="#">Greps Test</a>	3	✓	3	0	3		09 MAY 2008	02 JUN 2008	Thirsty Camel	Les
<a href="#">Poste Code Survey</a>	6	✓	1		1		10 OCT 2008	10 OCT 2008	Les Form	Les
<a href="#">Survey</a>	5	✓	1		3		28 AUG 2008	28 AUG 2008	Test Form	Ben
<a href="#">Thirsty Camel Form</a>	4	✓	6	0	12	✓	25 MAY 2008	28 MAY 2008	None	Les

Add to Favourites
Create New Survey

Create New Survey

3. Press

The Marketing Survey Maintenance screen is displayed.

**Marketing Survey Maintenance**

Company: AMC Master

Survey Description: New

Details
Questions

Survey: New Survey Comments:

Description:

Include Name/Address: False

Enabled: False

External Form:

Form Style: None

Answers per row:

Multiselect Width:

Multiselect Elements Visible:

Update
Delete

4. Select the survey you want to view from the [Survey](#) drop down list.

5. Press the Questions tab.

**Marketing Survey Maintenance**

Company: AMC Master

Survey Description: Test Survey

Details Questions

Question	Quest #	Order	Enabled	Compulsory	Type	Elements
<a href="#">Create Question</a>						
How did you hear	3	0	✓		Multi Choice	1
Have you shopped	1	1	✓	✓	True / False	1
How often do you	2	2	✓		Multi Choice	3

[Update](#) [Delete](#)

6. Press the **Question** field of the question you want to edit.

The Marketing Survey Question Maintenance screen is displayed.

**Marketing Survey Question Maintenance**

Company: AMC Master

Survey Description: Test Survey

Comments:

ID: How did you hear about our service?

Question: How did you hear about our service?

Enabled: True

Compulsory: False

Question Type: Multiple Choice

Question Order: 0

[Show/Hide / Edit Answers](#)

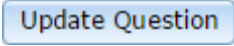
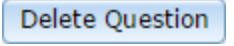
[Update Question](#) [Delete Question](#)

## Marketing Survey Question Maintenance screen key fields and buttons

Field	Description
<b>Company</b>	The company the survey is for.
<b>Survey Description</b>	The survey the question is being created for.
<b>ID</b>	The unique code identifying the question within this survey.
<b>Question</b>	The text of the question.
<b>Enabled</b>	Whether this question is displayed on the survey.
<b>Compulsory</b>	Whether the question must be answered to complete the survey.
<b>Question Type</b>	Select the type of question.
<b>Question Order</b>	Type the order the question appears in on the survey. Lower numbers appear earlier.
<b>Comments</b>	Any comment on the question. These are not shown to the survey-taker.
<b>Add / Edit Answers</b>	Press to add or edit the question's answers.



---

<b>Field</b>	<b>Description</b>
	Press to save changes to this question.
	Press to delete this question and its answers.

---

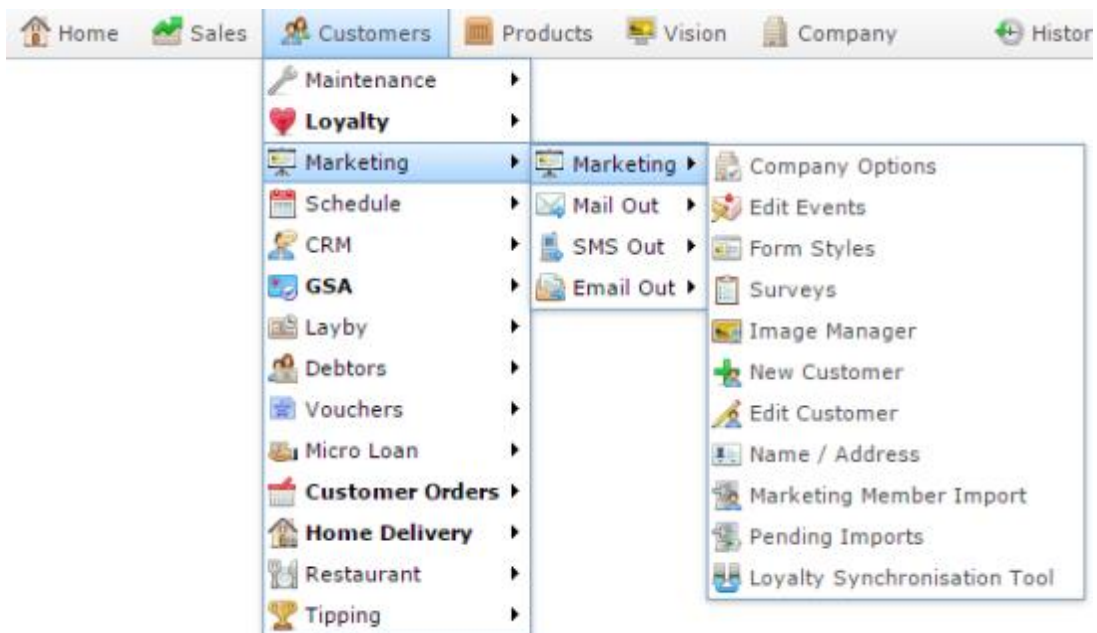
## Marketing Survey Question Answer Maintenance screen

Use this screen to add or edit answers to your survey questions.

### Opening the Marketing Survey Question Answer Maintenance screen

To open the Marketing Survey Question Answer Maintenance screen:

1. Press  Customers.
2. Press Marketing > Marketing > Surveys.



The Marketing Surveys report is displayed.

### Marketing Surveys

Descript	Survey #	Enabled	Question	Filters	Response	External Form	Created	Updated	Style	User
<a href="#">Bob Test Survey</a>	2	✓	8	0	13		06 MAY 2008	08 SEP 2009	Tree Survey	Bob
<a href="#">Clives Survey</a>	25	✓	1				11 MAY 2014	11 MAY 2014	Tasmani Devil	Clive
<a href="#">First Survey</a>	1	✓	3	0	7		05 MAY 2008	02 JUN 2008	Tasmani Devil	Bob
<a href="#">Greps Test</a>	3	✓	3	0	3		09 MAY 2008	02 JUN 2008	Thirsty Camel	Les
<a href="#">Poste Code Survey</a>	6	✓	1		1		10 OCT 2008	10 OCT 2008	Les Form	Les
<a href="#">Survey</a>	5	✓	1		3		28 AUG 2008	28 AUG 2008	Test Form	Ben
<a href="#">Thirsty Camel Form</a>	4	✓	6	0	12	✓	25 MAY 2008	28 MAY 2008	None	Les

Add to Favourites

Create New Survey

Create New Survey

3. Press

The Marketing Survey Maintenance screen is displayed.

**Marketing Survey Maintenance**

Company: AMC Master

Survey Description: New

Details Questions

Survey: New Survey Comments:

Description:

Include Name/Address: False

Enabled: False

External Form:

Form Style: None

Answers per row:

Multiselect Width:

Multiselect Elements Visible:

Update Delete

4. Select the survey you want to view from the Survey drop down list.

5. Press the Questions tab.

**Marketing Survey Maintenance**

Company: AMC Master

Survey Description: Test Survey

Details Questions

Question	Quest #	Order	Enabled	Compulsory	Type	Elements
<a href="#">Create Question</a>						
How did you hear	3	0	✓		Multi Choice	1
Have you shopped	1	1	✓	✓	True / False	1
How often do you	2	2	✓		Multi Choice	3

Update Delete

- Press the [Question](#) field of the question you want to edit.

The Marketing Survey Question Maintenance screen is displayed.

**Marketing Survey Question Maintenance**

Company: AMC Master

Survey Description: Test Survey

Comments:

ID: How did you hear about o

Question: How did you hear about our service?

Enabled: True

Compulsory: False

Question Type: Multiple Choice

Question Order: 0

[Show/Add / Edit Answers](#)

Update Question Delete Question

- Press [Add / Edit Answers](#).

The Marketing Survey Question Answer Maintenance screen is displayed.

**Marketing Survey Question Answer Maintenance**

Company: AMC Master

Survey Description: Test Survey [26]

Survey Question: How often do you shop with us? [2]

Survey Question Type: Multiple Choice

ID: New Answer

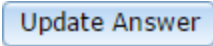
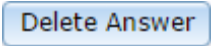
Answer:

Enabled: True

Answer Order:

Update Answer Delete Answer

## Marketing Survey Question Answer Maintenance screen key fields and buttons

Field	Description
<b>Company</b>	The company the survey belongs to.
<b>Survey Description</b>	The survey the question belongs to.
<b>Survey Question</b>	The question the answer belongs to.
<b>Survey Question Type</b>	The question type.
<b>ID</b>	Unique code identifying the answer for this question.
<b>Answer</b>	The text of the answer.
<b>Enabled</b>	Whether this answer is available for this question.
<b>Answer Order</b>	The order this answer appears in on the survey.
	Press to save this answer.
	Press to delete this answer.

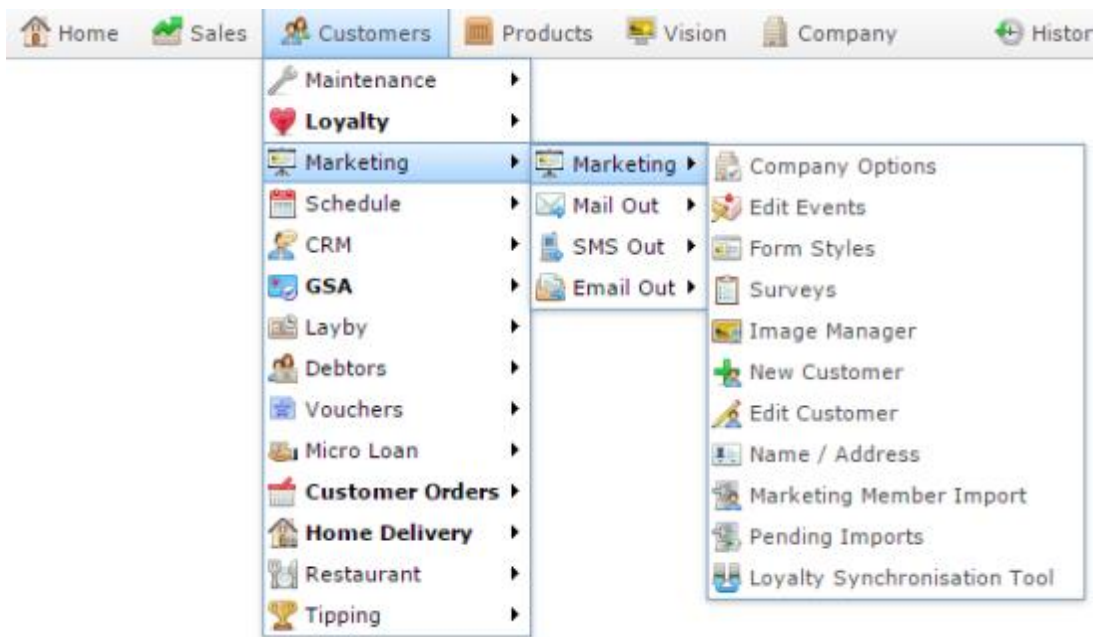
## Marketing Survey report

Use the Marketing Survey report to view and edit your marketing surveys.

### Opening the Marketing Survey report

To open the Marketing Survey report:

1. Press  Customers.
2. Press Marketing > Marketing > Surveys.



The Marketing Surveys report is displayed.

## Marketing Surveys

Descript	Survey #	Enabled	Question	Filters	Response	External Form	Created	Updated	Style	User
<a href="#">Bob Test Survey</a>	2	✓	8	0	13		06 MAY 2008	08 SEP 2009	Tree Survey	Bob
<a href="#">Clives Survey</a>	25	✓	1				11 MAY 2014	11 MAY 2014	Tasmani Devil	Clive
<a href="#">First Survey</a>	1	✓	3	0	7		05 MAY 2008	02 JUN 2008	Tasmani Devil	Bob
<a href="#">Gregs Test</a>	3	✓	3	0	3		09 MAY 2008	02 JUN 2008	Thirsty Camel	Les
<a href="#">Poste Code Survey</a>	6	✓	1		1		10 OCT 2008	10 OCT 2008	Les Form	Les
<a href="#">Survey</a>	5	✓	1		3		28 AUG 2008	28 AUG 2008	Test Form	Ben
<a href="#">Thirsty Camel Form</a>	4	✓	6	0	12	✓	25 MAY 2008	28 MAY 2008	None	Les

Add to Favourites


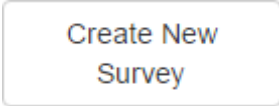
Create New Survey

## Marketing Survey report key fields

### Filters area

Use this area to filter the results shown in the report.

---

Field	Description
	Press to add this report to your Portal favourites for easier access.
	Press to create a new survey.

---



## Report area

This area displays report information.

**Note:** Not all fields may be displayed at once. Some fields depend on your filter field selections.

Field	Description
<b>Description</b>	Description of the survey.
<b>Survey #</b>	Unique code identifying the survey.
<b>Enabled</b>	Whether the survey can be used in the Portal.
<b>Questions</b>	Number of questions the survey contains.
<b>Filters</b>	Number of filters created for this survey.
<b>Responses</b>	Number of customers who have completed the survey.
<b>External Form</b>	Whether the survey uses an external form.
<b>Created</b>	Date the survey was created.
<b>Updated</b>	Date the survey was last updated.

---

<b>Field</b>	<b>Description</b>
<b>Style</b>	Style the survey uses.
<b>User</b>	User who last updated the survey.

---

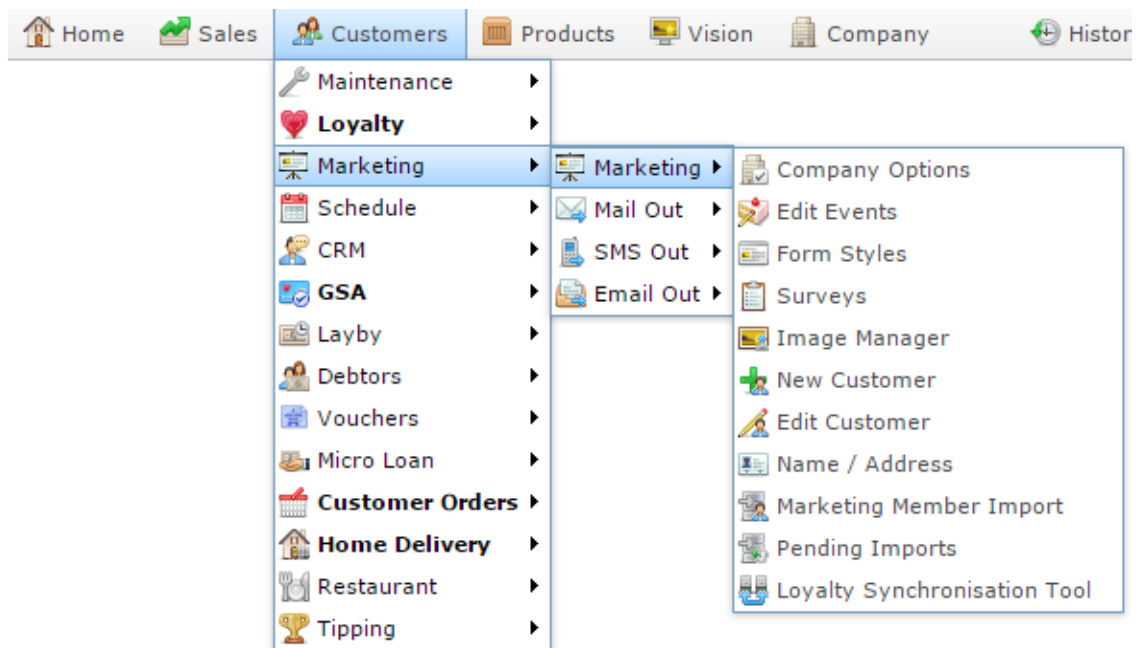
## Creating a new filter

Create a filter for a survey to filter the survey answers in a particular way.

See *Running a survey and viewing results* on page 149.

To create a new filter:

1. Press  Customers.
2. Press Marketing > Marketing > Surveys.



The Marketing Surveys report is displayed.

### Marketing Surveys

Description	Survey #	Enabled	Questions	Filters	Response	External Form	Created	Updated	Style	User
<a href="#">Bob Test Survey</a>	2	✓	8	0	13		06 MAY 2008	08 SEP 2009	Tree Survey	Bob
<a href="#">Clives Survey</a>	25	✓	1				11 MAY 2014	11 MAY 2014	Tasmani Devil	Clive
<a href="#">First Survey</a>	1	✓	3	0	7		05 MAY 2008	02 JUN 2008	Tasmani Devil	Bob
<a href="#">Gregs Test</a>	3	✓	3	0	3		09 MAY 2008	02 JUN 2008	Thirsty Camel	Les
<a href="#">Poste Code Survey</a>	6	✓	1		1		10 OCT 2008	10 OCT 2008	Les Form	Les
<a href="#">Survey</a>	5	✓	1		3		28 AUG 2008	28 AUG 2008	Test Form	Ben
<a href="#">Thirsty Camel Form</a>	4	✓	6	0	12	✓	25 MAY 2008	28 MAY 2008	None	Les

Add to Favourites

Create New Survey

- Press the **Description** of the survey you want to edit filters for.

A popup menu is displayed.

- Press **Edit Survey**.

The Marketing Survey Filters report is displayed.

### Marketing Survey Filters - for Survey : Test Survey [26]

Description	Filter #	Enabled	Questions	Created	Updated	User
RequirePrevic	1	✓	0	5/07/2016	5/07/2016	Bob

Add to Favourites

Create Filter

- Press

Create New Filter

The Filter Maintenance screen is displayed.

## Survey Bob Test Survey

Filter Description

Comments:

---

1. Have you visited the venue in the last month ? [Single Choice Question]  Or  And  Ignore

False  True  May Have  Must Have  Must Not Have  Ignore

6. Type a description of the filter in the **Filter Description** field.
7. For each question, select:
  - **Or** if you want to include surveys where the customer may have answered or skipped this question.
  - **And** if you want to only include surveys where the customer answered this question.
  - **Ignore** if you do not want to exclude or include surveys based on this question.
8. For each answer of a question where you selected **Or** or **And** , select:
  - **May Have** if you want to include surveys where the customer selected this answer for this question.
  - **Must Have** if you want to only include surveys where the customer selected this answer for this question and exclude surveys where the customer selected another answer.
  - **Must Not Have** if you want to exclude surveys where the customer selected this answer.
  - **Ignore** if you do not want to include or exclude surveys based on this answer.
9. Press  .

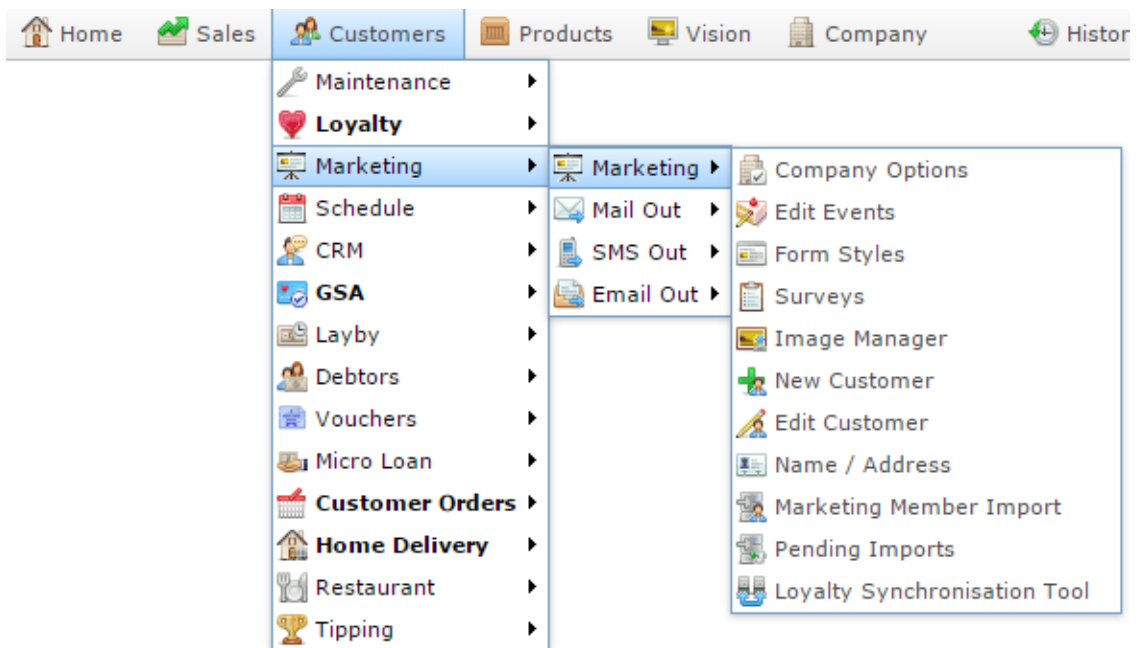
The filter is created.

## Editing a filter

Edit a filter to change how it includes or excludes surveys based on the customer's responses.

To edit a filter:

1. Press  Customers.
2. Press Marketing > Marketing > Surveys.



The Marketing Surveys report is displayed.

## Marketing Surveys

Description	Survey #	Enabled	Questions	Filters	Response	External Form	Created	Updated	Style	User
<a href="#">Bob Test Survey</a>	2	✓	8	0	13		06 MAY 2008	08 SEP 2009	Tree Survey	Bob
<a href="#">Clives Survey</a>	25	✓	1				11 MAY 2014	11 MAY 2014	Tasmani Devil	Clive
<a href="#">First Survey</a>	1	✓	3	0	7		05 MAY 2008	02 JUN 2008	Tasmani Devil	Bob
<a href="#">Gregs Test</a>	3	✓	3	0	3		09 MAY 2008	02 JUN 2008	Thirsty Camel	Les
<a href="#">Poste Code Survey</a>	6	✓	1		1		10 OCT 2008	10 OCT 2008	Les Form	Les
<a href="#">Survey</a>	5	✓	1		3		28 AUG 2008	28 AUG 2008	Test Form	Ben
<a href="#">Thirsty Camel Form</a>	4	✓	6	0	12	✓	25 MAY 2008	28 MAY 2008	None	Les

Add to Favourites

Create New Survey

- Press the **Description** of the survey you want to edit filters for.

A popup menu is displayed.

- Press **Edit Survey**.

The Marketing Survey Filters report is displayed.

### Marketing Survey Filters - for Survey : Test Survey [26]

Description	Filter #	Enabled	Questions	Created	Updated	User
RequirePrevic	1	✓	0	5/07/2016	5/07/2016	Bob

Add to Favourites

Create Filter

- Press the **Description** of the filter you want to edit.

The Filter Maintenance screen is displayed.

## Survey Test Survey

Filter Description

Comments:

---

---

How did you hear about our service? [Multiple Choice Question]  Or  And  Ignore

6. Make the required changes.  
See *Filter Maintenance screen* on page 140.  
Also see *Creating a new filter* on page 131.
7. Press .  
The filter is saved.

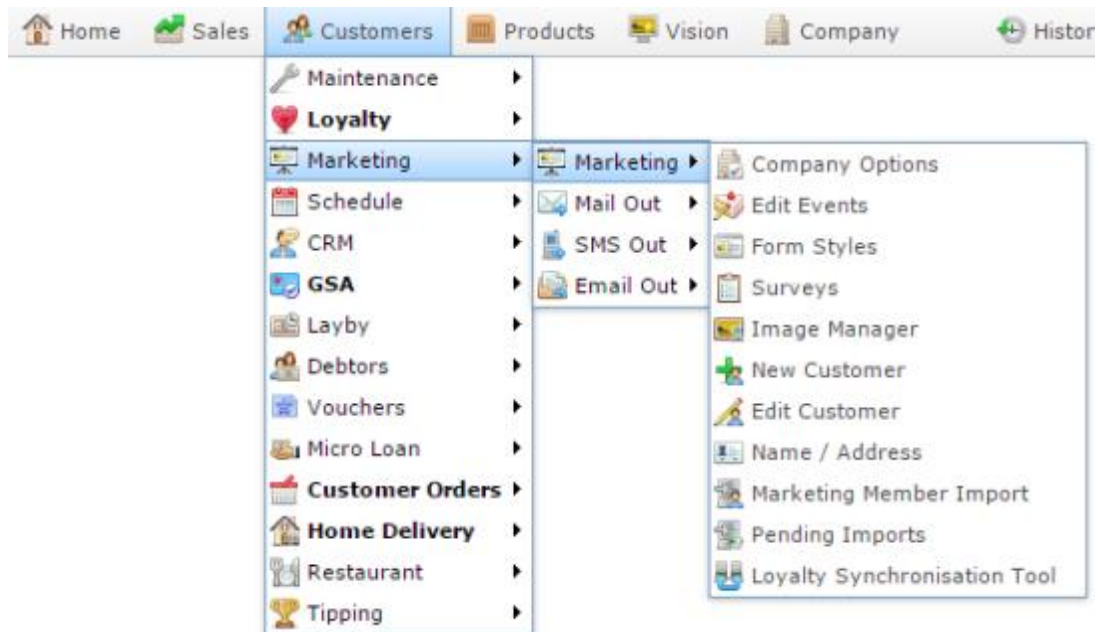


## Deleting a filter

Delete a filter if you do not want to use this customer grouping in the Portal.

To delete a filter:

1. Press  Customers.
2. Press Marketing > Marketing > Surveys.



The Marketing Surveys report is displayed.

### Marketing Surveys

Descript	Survey #	Enabled	Question	Filters	Response	External Form	Created	Updated	Style	User
<a href="#">Bob Test Survey</a>	2	✓	8	0	13		06 MAY 2008	08 SEP 2009	Tree Survey	Bob
<a href="#">Clives Survey</a>	25	✓	1				11 MAY 2014	11 MAY 2014	Tasmani Devil	Clive
<a href="#">First Survey</a>	1	✓	3	0	7		05 MAY 2008	02 JUN 2008	Tasmani Devil	Bob
<a href="#">Greps Test</a>	3	✓	3	0	3		09 MAY 2008	02 JUN 2008	Thirsty Camel	Les
<a href="#">Poste Code Survey</a>	6	✓	1		1		10 OCT 2008	10 OCT 2008	Les Form	Les
<a href="#">Survey</a>	5	✓	1		3		28 AUG 2008	28 AUG 2008	Test Form	Ben
<a href="#">Thirsty Camel Form</a>	4	✓	6	0	12	✓	25 MAY 2008	28 MAY 2008	None	Les

Add to Favourites
Create New Survey

3. Press the **Description** of the survey you want to edit filters for.

A popup menu is displayed.

4. Press **Edit Survey**.

The Marketing Survey Filters report is displayed.

### Marketing Survey Filters - for Survey : Test Survey [26]

Description	Filter #	Enabled	Questions	Created	Updated	User
RequirePrevic 1		✓	0	5/07/2016	5/07/2016	Bob

Add to Favourites
Create Filter

5. Press the **Description** of the filter you want to delete.

The Filter Maintenance screen is displayed.

## Survey Test Survey

Filter Description

Comments:

---

---

How did you hear about our service? [Multiple Choice Question]

Or  And  Ignore

6. Press .

The filter is deleted.

## Filter Maintenance screen

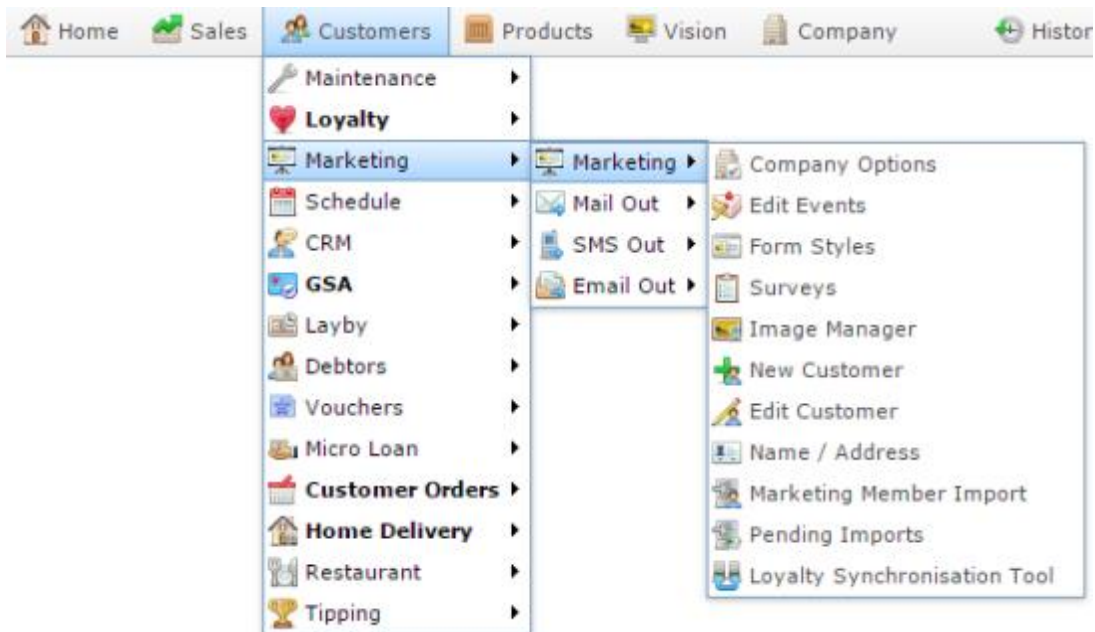
Use this screen to edit and maintain filters for individual surveys. Filters can be used to find particular groups of customers that responded to your survey in a particular way. For example, grouping all of your customers who have shopped with you within the last month, claim to have spent more than \$100 each time, and are interested in a particular department.

You can use these groupings to send out further surveys or marketing materials.

## Opening the Filter Maintenance screen

To open the Filter Maintenance screen:

1. Press  Customers.
2. Press Marketing > Marketing > Surveys.



The Marketing Surveys report is displayed.

### Marketing Surveys

Descript	Survey #	Enabled	Question	Filters	Response	External Form	Created	Updated	Style	User
<a href="#">Bob Test Survey</a>	2	✓	8	0	13		06 MAY 2008	08 SEP 2009	Tree Survey	Bob
<a href="#">Clives Survey</a>	25	✓	1				11 MAY 2014	11 MAY 2014	Tasmani Devil	Clive
<a href="#">First Survey</a>	1	✓	3	0	7		05 MAY 2008	02 JUN 2008	Tasmani Devil	Bob
<a href="#">Greps Test</a>	3	✓	3	0	3		09 MAY 2008	02 JUN 2008	Thirsty Camel	Les
<a href="#">Poste Code Survey</a>	6	✓	1		1		10 OCT 2008	10 OCT 2008	Les Form	Les
<a href="#">Survey</a>	5	✓	1		3		28 AUG 2008	28 AUG 2008	Test Form	Ben
<a href="#">Thirsty Camel Form</a>	4	✓	6	0	12	✓	25 MAY 2008	28 MAY 2008	None	Les

Add to Favourites    Create New Survey

- Press the **Description** of the survey you want to edit filters for. A popup menu is displayed.

- Press **Edit Survey**.

The Marketing Survey Filters report is displayed.

### Marketing Survey Filters - for Survey : Test Survey [26]

Description	Filter #	Enabled	Questions	Created	Updated	User
RequirePrevic 1		✓	0	5/07/2016	5/07/2016	Bob

Add to Favourites    Create Filter

- Press the **Description** of the filter you want to edit.

The Filter Maintenance screen is displayed.

## Survey Test Survey

Filter Description

Comments:

---

---

How did you hear about our service? [Multiple Choice Question]  Or  And  Ignore

### Filter Maintenance screen key fields and buttons

Field	Description
<b>Filter Description</b>	Type a description to identify the filter.
<input type="button" value="Save"/>	Save changes to the filter.
<input type="button" value="Delete"/>	Delete this filter.
<b>Comments</b>	Add any comment on the filter.

---

Field	Description
<b>Or / And / Ignore</b>	This field is presented for each question in the survey. Select how the filter should assess this question:
<b>Or</b>	The customer must have answered one of the questions marked "Or" for the survey to be included in this filter.
<b>And</b>	The customer must have answered this question for the survey to be included in this filter.
<b>Ignore</b>	The filter ignores whether the customer answered this question.

**Note:** A customer may still be included or excluded based on their answer to this question, but whether or not they answered this question at all does not affect their inclusion in the filter.

---

---

Field	Description
<b>May Have / Must Have / Must Not Have / Ignore</b>	This field is presented for each answer in a survey's question. Select how the filter should assess this answer:
<b>May Have</b>	The filter accepts surveys where the customer selected this answer.
<b>Must Have</b>	The filter accepts surveys only if the customer has selected this option. If the customer did not select this option, the survey is not included in the filter.  For example, include only customers who have shopped with you in the last week.
<b>Must Not Have</b>	The filter accepts surveys only if the customer has not selected this option. If the customer selected this option, the survey is not included in the filter.  For example, exclude customers who have never shopped with you.
<b>Ignore</b>	The filter ignores this answer. If a customer selected this answer, it does not affect whether the filter includes their survey.

---



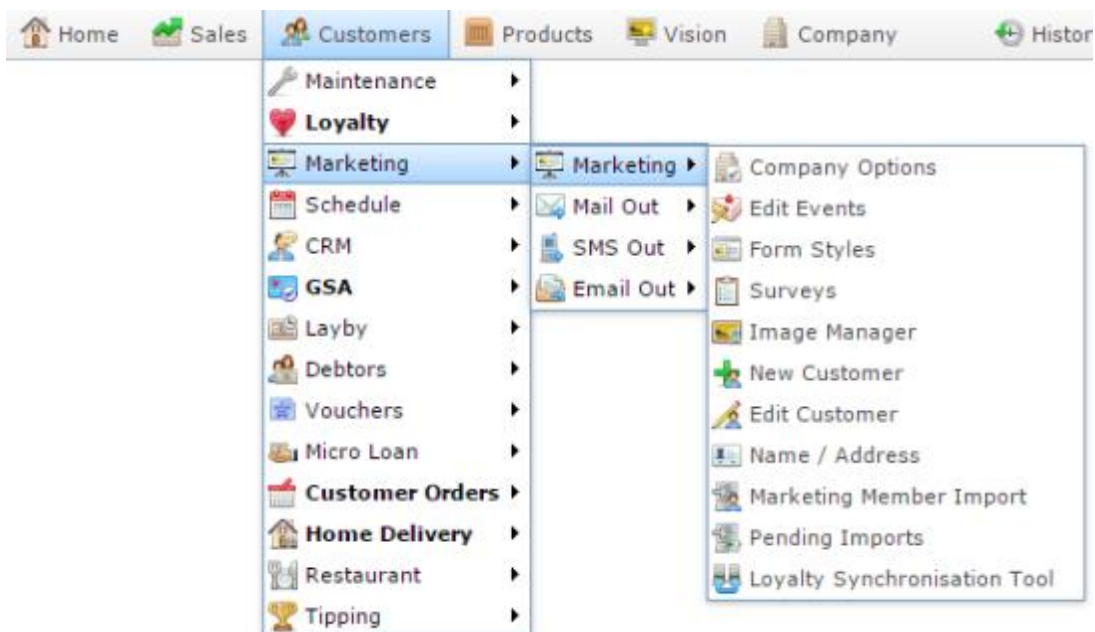
## Marketing Filters report

Use the Marketing Filters report to view and edit the filters that you use to examine marketing surveys.

### Opening the Marketing Filters report

To open the Marketing Filters report:

1. Press  Customers.
2. Press Marketing > Marketing > Surveys.



The Marketing Surveys report is displayed.

### Marketing Surveys

Description	Survey #	Enabled	Questions	Filters	Response	External Form	Created	Updated	Style	User
<a href="#">Bob Test Survey</a>	2	✓	8	0	13		06 MAY 2008	08 SEP 2009	Tree Survey	Bob
<a href="#">Clives Survey</a>	25	✓	1				11 MAY 2014	11 MAY 2014	Tasmani Devil	Clive
<a href="#">First Survey</a>	1	✓	3	0	7		05 MAY 2008	02 JUN 2008	Tasmani Devil	Bob
<a href="#">Greps Test</a>	3	✓	3	0	3		09 MAY 2008	02 JUN 2008	Thirsty Camel	Les
<a href="#">Poste Code Survey</a>	6	✓	1		1		10 OCT 2008	10 OCT 2008	Les Form	Les
<a href="#">Survey</a>	5	✓	1		3		28 AUG 2008	28 AUG 2008	Test Form	Ben
<a href="#">Thirsty Camel Form</a>	4	✓	6	0	12	✓	25 MAY 2008	28 MAY 2008	None	Les

Add to Favourites

Create New Survey

3. Press the [Description](#) of the survey you want to edit filters for.

A popup menu is displayed.

4. Press [Edit Survey](#).

The Marketing Survey Filters report is displayed.

### Marketing Survey Filters - for Survey : Test Survey [26]

Description	Filter #	Enabled	Questions	Created	Updated	User
RequirePrevic 1		✓	0	5/07/2016	5/07/2016	Bob

Add to Favourites

Create Filter

## Marketing Filters report key fields

### Filters area

Use this area to filter the results shown in the report.

---

Field	Description
<a href="#">Add to Favourites</a>	Press to add this report to your Portal favourites for easier access.
<a href="#">Create New Filter</a>	Press to create a new filter.

---

## Report area

This area displays report information.

**Note:** Not all fields may be displayed at once. Some fields depend on your filter field selections.

Field	Description
<b>Description</b>	Description of the filter.
<b>Filter #</b>	Unique code identifying the filter.
<b>Enabled</b>	Whether the filter can be used in the Portal.
<b>Questions</b>	Number of questions the filter requires.
<b>Created</b>	Date the filter was created.
<b>Updated</b>	Date the filter was last updated.
<b>User</b>	User who updated the filter.

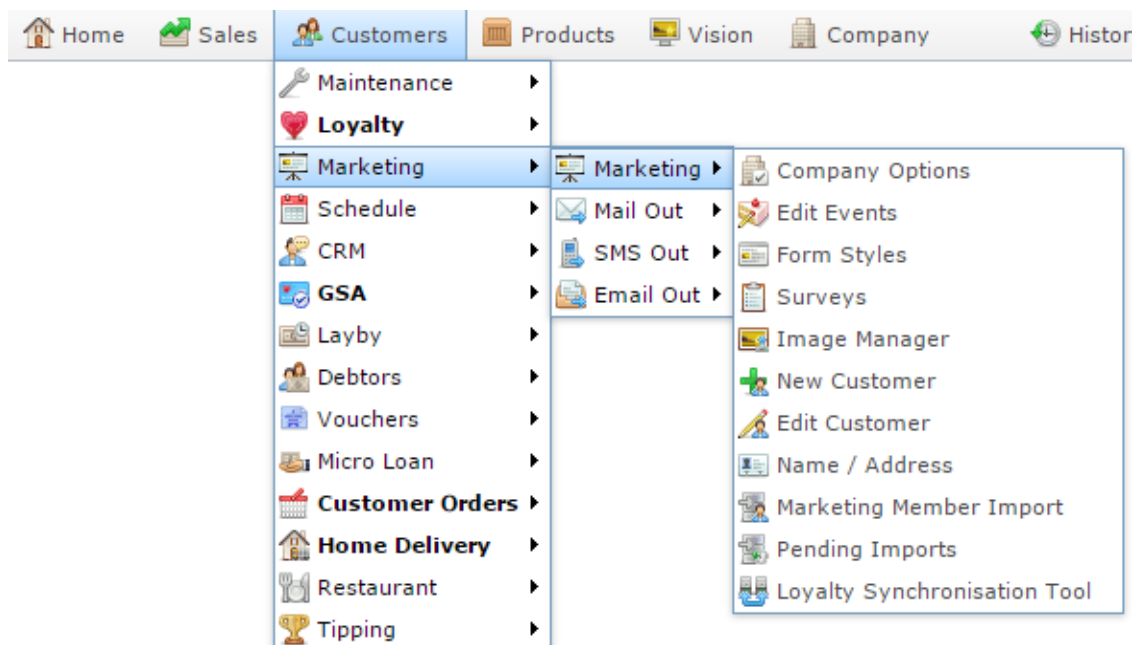
## Running a survey and viewing results

After your customers have responded to the survey, run a survey to view or download the results of the survey.

**Tip:** You will get the most out of your survey results if you create filters to group the responses. For example, to view the responses from a certain suburb, age demographic, or customers who regularly shop at your company. See *Creating a new filter* on page 131.

To run a survey:

1. Press  Customers.
2. Press Marketing > Marketing > Surveys.



The Marketing Surveys report is displayed.

## Marketing Surveys

Description	Survey #	Enabled	Questions	Filters	Responses	External Form	Created	Updated	Style	User
<a href="#">Bob Test Survey</a>	2	✓	8	0	13		06 MAY 2008	08 SEP 2009	Tree Survey	Bob
<a href="#">Clives Survey</a>	25	✓	1				11 MAY 2014	11 MAY 2014	Tasmani Devil	Clive
<a href="#">First Survey</a>	1	✓	3	0	7		05 MAY 2008	02 JUN 2008	Tasmani Devil	Bob
<a href="#">Gregs Test</a>	3	✓	3	0	3		09 MAY 2008	02 JUN 2008	Thirsty Camel	Les
<a href="#">Poste Code Survey</a>	6	✓	1		1		10 OCT 2008	10 OCT 2008	Les Form	Les
<a href="#">Survey</a>	5	✓	1		3		28 AUG 2008	28 AUG 2008	Test Form	Ben
<a href="#">Thirsty Camel Form</a>	4	✓	6	0	12	✓	25 MAY 2008	28 MAY 2008	None	Les

Add to Favourites

Create New Survey

3. Press the **Description** of the survey you want to run.

A popup menu is displayed.

4. Press **Run Survey**.

The Run Survey report is displayed.

The screenshot displays a web interface for managing marketing and surveys. It features a 'Parameters' table, an 'Email' preview window, and a sidebar with various filter categories.

**Parameters Table:**

Description	Filter #	Enabled	Questions	Created	Updated	User	Count
All							1,591
All Respondent							13
Non Respondent							1,578
Test Filter	1	✓	8	27/05/2008	27/05/2008	Bob	8

**Email Preview:**

[Having troubles reading. Click here](#)  
 First Name Fred bob 111  
 Last Name Smith  
 Site 1  
 Site Name AMC  
 Company -1  
 Company Name AMC Master  
 Address Address Line 1  
 Address 1 Address Line 1  
 Address 2 Address Line 2  
 Address 3 Address Line 3  
 Suburb The Suburb  
 State The State  
 Postcode ThePostCode  
 Country Australia

**Filter Categories (Sidebar):**

- Extra:** Marketing only
- Options:** Opt In Email
- Merge Form:** Market Test email
- Offer:** None
- Job:** 171
- Birth Month:** None
- Age Range:** None
- Gender:** Both
- Names:** None

5. Press the **Description** of the filter you want to view or download.

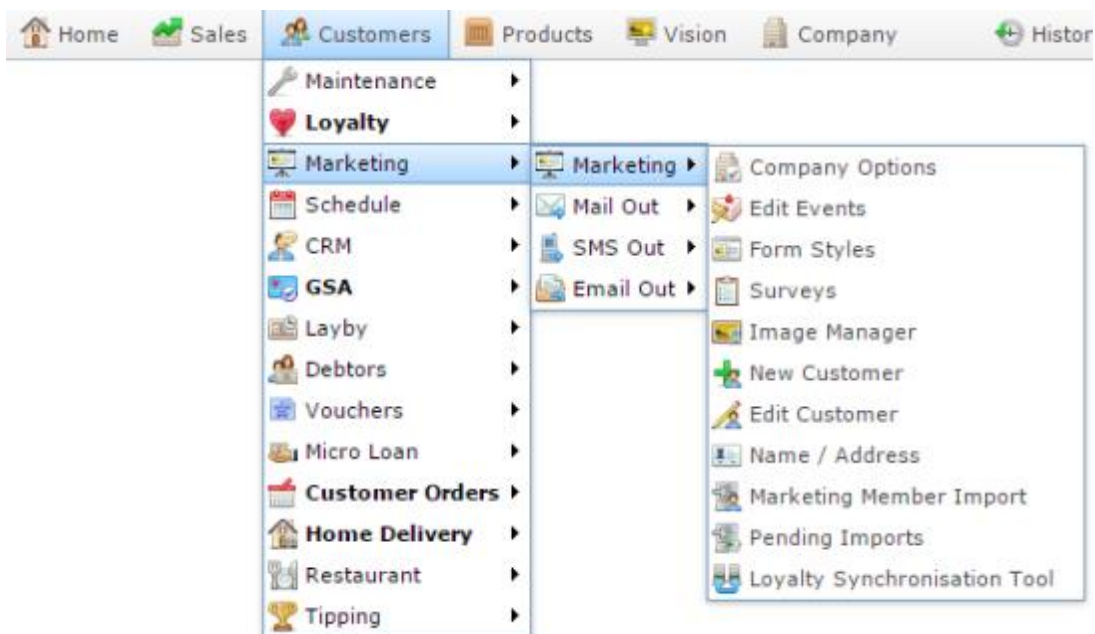
## Run Survey report

Use the Run Survey report to view or download lists of customers according to your survey filters.

### Opening the Run Survey report

To open the Run Survey report:

1. Press  Customers.
2. Press Marketing > Marketing > Surveys.



The Marketing Surveys report is displayed.



### Marketing Surveys

Descript	Survey #	Enabled	Question	Filters	Response	External Form	Created	Updated	Style	User
<a href="#">Bob Test Survey</a>	2	✓	8	0	13		06 MAY 2008	08 SEP 2009	Tree Survey	Bob
<a href="#">Clives Survey</a>	25	✓	1				11 MAY 2014	11 MAY 2014	Tasmani Devil	Clive
<a href="#">First Survey</a>	1	✓	3	0	7		05 MAY 2008	02 JUN 2008	Tasmani Devil	Bob
<a href="#">Greps Test</a>	3	✓	3	0	3		09 MAY 2008	02 JUN 2008	Thirsty Camel	Les
<a href="#">Poste Code Survey</a>	6	✓	1		1		10 OCT 2008	10 OCT 2008	Les Form	Les
<a href="#">Survey</a>	5	✓	1		3		28 AUG 2008	28 AUG 2008	Test Form	Ben
<a href="#">Thirsty Camel Form</a>	4	✓	6	0	12	✓	25 MAY 2008	28 MAY 2008	None	Les

Add to Favourites

Create New Survey

- Press the **Description** of the survey you want to run.  
A popup menu is displayed.
- Press **Run Survey**.  
The Run Survey report is displayed.

Managing marketing and surveys

Parameters							
Description	Filter #	Enabled	Questions	Created	Updated	User	Count
All							1,591
All Respondent							13
Non Respondent							1,578
Test Filter	1	✓	8	27/05/2008	27/05/2008	Bob	8

Email

[Having troubles reading. Click here](#)

First Name Fred bob 111  
 Last Name Smuth  
 Site 1  
 Site Name AMC  
 Company -1  
 Company Name AMC Master  
 Address Address Line 1  
 Address 1 Address Line 1  
 Address 2 Address Line 2  
 Address 3 Address Line 3  
 Suburb The Suburb  
 State The State  
 Postcode ThePostCode  
 Country Australia

**Extra**

Marketing only >

**Options**

Opt In Email >

**Merge Form**

Market Test email >

**Offer**

None >

**Job**

171 >

**Birth Month**

None >

**Age Range**

None >

**Gender**

Both >

**Names**

None >

## Run Survey report key fields

### Filters area

Use this area to filter the results shown in the report.

Field	Description
<div data-bbox="209 651 488 719" style="border: 1px solid #ccc; padding: 5px; display: inline-block;">Add to Favourites</div>	<p>Press to add this report to your Portal favourites for easier access.</p>
<p><b>Extra</b></p>	<p>Limit the customer list to:</p> <ul style="list-style-type: none"> <li>▪ Customers who are only marketing customers.</li> <li>▪ Customers who are marketing customers and not loyalty customers.</li> <li>▪ Customers who are marketing customers and also loyalty customers.</li> </ul>
<p><b>Options</b></p>	<p>Limit the customer list to customers who have opted in to receive marketing material via:</p> <ul style="list-style-type: none"> <li>▪ Mail.</li> <li>▪ Email.</li> <li>▪ SMS.</li> </ul> <p>Or select All to not limit by opt-in selection.</p>
<p><b>Gender</b></p>	<p>Select to restrict the report by gender.</p>
<p><b>Birth Month</b></p>	<p>Filter the report on the customer's birth month.</p>
<p><b>Age Range</b></p>	<p>Filter the report by the customer's age.</p>

---

<b>Field</b>	<b>Description</b>
<b>Names</b>	Filter the report by the letter the customer's first or last names start with.

---

## Report area

This area displays report information.

**Note:** Not all fields may be displayed at once. Some fields depend on your filter field selections.

Field	Description
<b>Description</b>	Description of the filter.
<b>Filter #</b>	Unique code identifying the filter.
<b>Enabled</b>	Whether the filter can be used in the Portal.
<b>Questions</b>	Number of questions the filter requires.
<b>Created</b>	Date the filter was created.
<b>Updated</b>	Date the filter was last updated.
<b>User</b>	User who updated the filter.
<b>Count</b>	Number of customers this filter represents.
<b>Email</b>	Email sent as part of this survey.

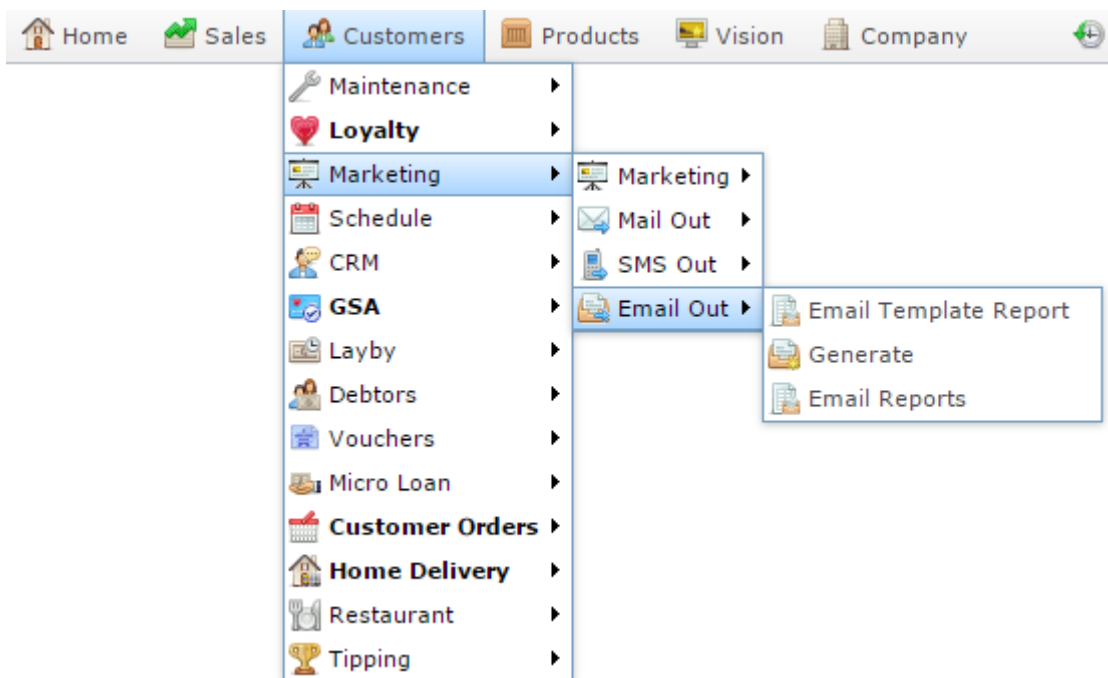
## Creating a new email mail out

Create a new email mail out to send to loyalty members.

**Tip:** To personalise your mail outs, see *Using merge fields to customise mail outs* on page 160.

To create a new email mail out:

1. Press Marketing > Email Out > Email Templates Report.



The Email Templates report is displayed.

### Email Templates Report

Description	Subject	Size (K)	Changed
<a href="#">Test 4</a>	Test 4		1 24 Jan 2016
<a href="#">Test 3</a>	test 3		1 22 Jan 2016
<a href="#">Test Market</a>	Test		1 22 Jan 2016
<a href="#">Market Test email</a>	Marketing email test		7 22 Jan 2016

Type

Emails

Add to Favourites

Create

2. Press

Create

The Email Detail Maintenance screen is displayed.

3. Type a description or name for the email mail out in the **Description** field.
4. Type the email subject in the **Subject** field.
5. Type the name the email should appear from in the **From Name** field.
6. Type the email address the email should be sent from in the **Return Email** field.
7. Type the email mail out message in the body field.

**Tip:** To link marketing surveys in your email, see *Linking a survey in a mail out* on page 165.

8. Press  **Save**.

The email mail out is saved.

## Using merge fields to customise mail outs

Merge fields or merge tags are placeholders that the Portal completes with real information when the mail out is produced. For example, a customer's name and address, voucher amounts, loyalty points information or even expiry dates calculated from the date the email was sent.

### Using merge fields

Merge fields are defined by the Portal. To use a merge field, type it in the mail out using the format in the table below. Remember:

- Merge tags must be typed exactly as shown. Double-check your spelling.
- Merge fields are always typed in UPPERCASE. That is, used capital letters only.
- Merge fields always have two lesser-than and greater-than signs on each side like this: <<FIELDNAME>>.
- There are no spaces between any of the letters, signs or numbers used in the merge tag.

**Note:** Some merge tags use a number from 1 to 10 in addition to the merge term to identify an external link. For example, the merge field to include a survey link also specifies the number of the survey, as listed in the mail out's Link page. Where the field displays an underscore in this documentation \_ you should replace the underscore with the relevant information.

### Merge fields

Merge field	Description
<<TITLE>>	Insert the customer's title, such as Mr or Ms.
<<FIRST>>	Insert the customer's first name.
<<LAST>>	Insert the customer's last name.
<<ADDRESS>>	Insert the customer's address.



Merge field	Description
<<SUBURB>>	Insert the customer's suburb.
<<STATE>>	Insert the customer's state or territory.
<<POSTCODE>>	Insert the customer's postcode.
<<ADDRESS1>>	Insert the customer's first address line.
<<ADDRESS2>>	Insert the customer's second address line.
<<ADDRESS3>>	Insert the customer's third address line.
<<OPTOUT>>	Insert the link the customer should press to opt out of receiving further mail outs.
<<CARD>>	Insert the customer's loyalty card number.
<<BARCODE>>	Insert the customer's card number as a barcode.
<<AMOUNT>>	Insert the voucher amount.
<<REMAINING>>	Insert the customer's remaining loyalty points balance.
<<POINTS>>	Insert the number of points the customer has used.
<<BALANCE>>	Insert the customer's points balance.

<b>Merge field</b>	<b>Description</b>
<b>&lt;&lt;VOUCHER&gt;&gt;</b>	Insert the code for the voucher being sent to the customer.
<b>&lt;&lt;BATCH&gt;&gt;</b>	Insert the batch number.
<b>&lt;&lt;DATE&gt;&gt;</b>	Insert the voucher date.
<b>&lt;&lt;DAY&gt;&gt;</b>	Insert the current date.
<b>&lt;&lt;EXPIRY+14&gt;&gt;</b>	Insert an expiry date that is 14 days from the current date.
<b>&lt;&lt;EXPIRY+21&gt;&gt;</b>	Insert an expiry date that is 21 days from the current date.
<b>&lt;&lt;EXPIRY+30&gt;&gt;</b>	Insert an expiry date that is 30 days from the current date.
<b>&lt;&lt;EXPIRY+60&gt;&gt;</b>	Insert an expiry date that is 60 days from the current date.
<b>&lt;&lt;EXPIRY+90&gt;&gt;</b>	Insert an expiry date that is 90 days from the current date.
<b>&lt;&lt;EXPIRY+120&gt;&gt;</b>	Insert an expiry date that is 120 days from the current date.
<b>&lt;&lt;EXPIRY+150&gt;&gt;</b>	Insert an expiry date that is 150 days from the current date.
<b>&lt;&lt;EXPIRY+180&gt;&gt;</b>	Insert an expiry date that is 180 days from the current date.
<b>&lt;&lt;SITE&gt;&gt;</b>	Insert the site code.

Merge field	Description
<<SITENAME>>	Insert the name of the site.
<<COMPANY>>	Insert the company code.
<<COMPANYNAME>>	Insert the name of the company.
<<LOGIN>>	Insert the customer's login name.
<<BIRTHDATE>>	Insert the customer's birth date.
<<BIRTHMONTH>>	Insert the month the customer was born.
<<LASTSALE>>	Insert the date the customer last purchased something from your company.
<<EMAIL>>	Insert the customer's email.
<<CARDTYPE>>	Insert the customer's loyalty card type.
<<HOME>>	Insert the customer's home site.
<<MOBILE>>	Insert the customer's mobile number.
<<LOST>>	Insert the Report Lost Card link.
<<VIEW>>	Insert the View Email Online link.

Merge field	Description
<<FORWARD>>	Insert the Forward to a Friend link.
<<FORWARDI>>	Insert the image for the Forward to a Friend link.
<<LINK_>>	Insert a link with the specified link. For example, <<LINK5>> links to the fifth link in the mail out's Links page.
<<LINKI_>>	Insert the image for the specified link. For example, <<LINKI5>> displays the image of the fifth link in the mail out's Links page.
<<SURVEY_>>	Insert a link to the specified survey For example, <<SURVEY3>> creates a link to the third survey listed on the mail out's Links page.
<<TRACKING>>	Insert tracking information.
<<TRACKINGALT>>	Insert tracking information.

## Linking a survey in a mail out

Link surveys to your mail outs to send surveys to your customers in email or SMS mail outs.

**Note:** We do not recommend sending surveys via SMS, as the hyperlink length may exceed the SMS character limit.

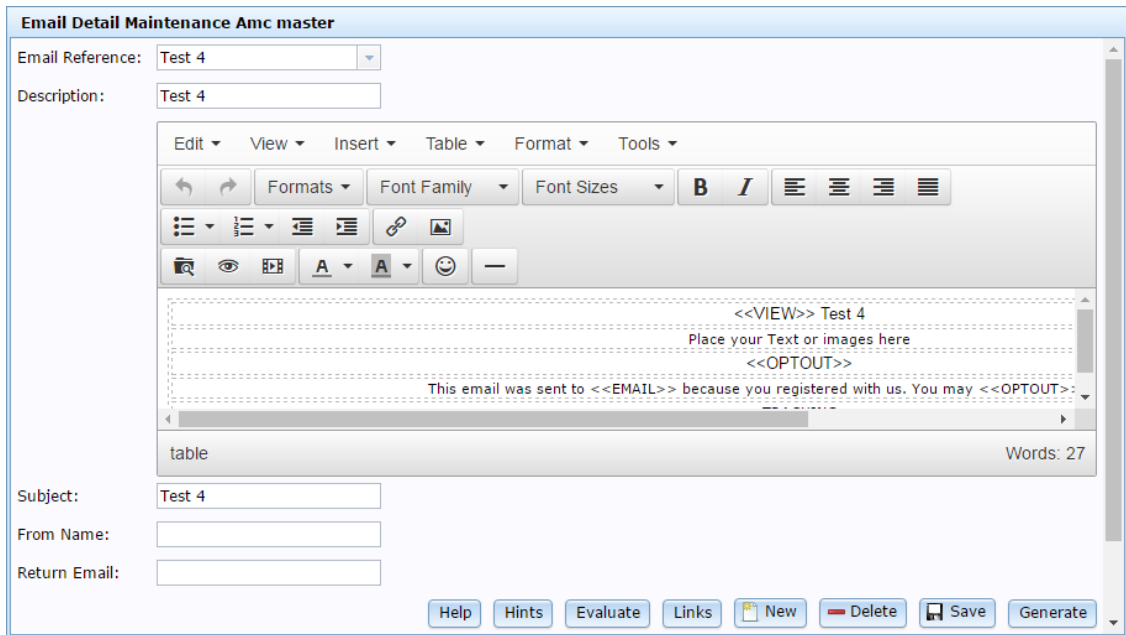
To link a survey in a mail out:

1. Create the survey you want to send.  
See *Creating a new survey* on page 81.
2. Record the survey ID of the survey.

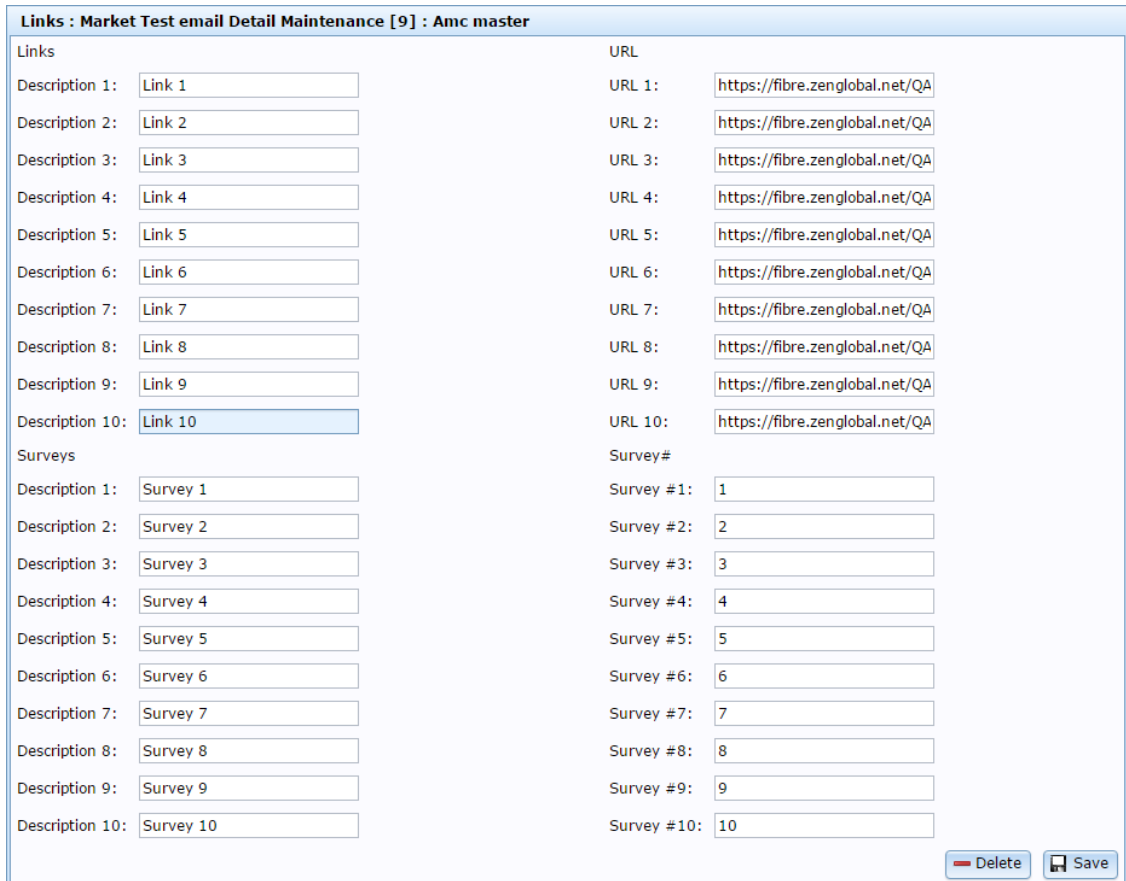
**Tip:** You can find the survey ID in the **Survey** field of Marketing Survey Maintenance, or the Marketing Surveys report. See *Marketing Survey report* on page 126.

The screenshot shows the 'Marketing Survey Maintenance' window. The 'Survey' dropdown menu is highlighted with a yellow box and contains the text 'First Survey [1]'. The 'Description' field contains 'First Survey'. The 'Include Name/Address' dropdown is set to 'False'. The 'Enabled' dropdown is set to 'True'. The 'Form Style' dropdown is set to 'Tasmania Devil'. The 'Created' date is '5/05/2008' and the 'Changed' date is '2/06/2008'. The 'Answers per row' field is '4'. The 'Multiselect Width' and 'Multiselect Elements Visible' fields are empty. A 'Comments' field contains the text: 'This is a comment field that allows up to 3000 characters including CR and LF'. At the bottom right, there are 'Update' and 'Delete' buttons.

3. Create your mail out normally.  
See *Creating a new email mail out* on page 158.  
The Email Detail Maintenance screen is displayed.



4. Press **Links**.
5. The Links screen is displayed.



6. For each survey you want to add to this mail out:

1. Type the text you want to appear as the survey link in the **Description** field. For example, [Click here](#).

**Links : Market Test email Detail Maintenance [9] : Amc master**

Links		URL	
Description 1:	<input type="text" value="Link 1"/>	URL 1:	<input type="text" value="https://fibre.zenglobal.net/QA"/>
Description 2:	<input type="text" value="Link 2"/>	URL 2:	<input type="text" value="https://fibre.zenglobal.net/QA"/>
Description 3:	<input type="text" value="Link 3"/>	URL 3:	<input type="text" value="https://fibre.zenglobal.net/QA"/>
Description 4:	<input type="text" value="Link 4"/>	URL 4:	<input type="text" value="https://fibre.zenglobal.net/QA"/>
Description 5:	<input type="text" value="Link 5"/>	URL 5:	<input type="text" value="https://fibre.zenglobal.net/QA"/>
Description 6:	<input type="text" value="Link 6"/>	URL 6:	<input type="text" value="https://fibre.zenglobal.net/QA"/>
Description 7:	<input type="text" value="Link 7"/>	URL 7:	<input type="text" value="https://fibre.zenglobal.net/QA"/>
Description 8:	<input type="text" value="Link 8"/>	URL 8:	<input type="text" value="https://fibre.zenglobal.net/QA"/>
Description 9:	<input type="text" value="Link 9"/>	URL 9:	<input type="text" value="https://fibre.zenglobal.net/QA"/>
Description 10:	<input type="text" value="Link 10"/>	URL 10:	<input type="text" value="https://fibre.zenglobal.net/QA"/>

Surveys		Survey#	
Description 1:	<input type="text" value="Survey 1"/>	Survey #1:	<input type="text" value="1"/>
Description 2:	<input type="text" value="Survey 2"/>	Survey #2:	<input type="text" value="2"/>
Description 3:	<input type="text" value="Survey 3"/>	Survey #3:	<input type="text" value="3"/>
Description 4:	<input type="text" value="Survey 4"/>	Survey #4:	<input type="text" value="4"/>
Description 5:	<input type="text" value="Survey 5"/>	Survey #5:	<input type="text" value="5"/>
Description 6:	<input type="text" value="Survey 6"/>	Survey #6:	<input type="text" value="6"/>
Description 7:	<input type="text" value="Survey 7"/>	Survey #7:	<input type="text" value="7"/>
Description 8:	<input type="text" value="Survey 8"/>	Survey #8:	<input type="text" value="8"/>
Description 9:	<input type="text" value="Survey 9"/>	Survey #9:	<input type="text" value="9"/>
Description 10:	<input type="text" value="Survey 10"/>	Survey #10:	<input type="text" value="10"/>

2. Type the survey ID you recorded earlier in the corresponding **Survey #** field.

**Links : Market Test email Detail Maintenance [9] : Amc master**

Links		URL	
Description 1:	<input type="text" value="Link 1"/>	URL 1:	<input type="text" value="https://fibre.zenglobal.net/QA"/>
Description 2:	<input type="text" value="Link 2"/>	URL 2:	<input type="text" value="https://fibre.zenglobal.net/QA"/>
Description 3:	<input type="text" value="Link 3"/>	URL 3:	<input type="text" value="https://fibre.zenglobal.net/QA"/>
Description 4:	<input type="text" value="Link 4"/>	URL 4:	<input type="text" value="https://fibre.zenglobal.net/QA"/>
Description 5:	<input type="text" value="Link 5"/>	URL 5:	<input type="text" value="https://fibre.zenglobal.net/QA"/>
Description 6:	<input type="text" value="Link 6"/>	URL 6:	<input type="text" value="https://fibre.zenglobal.net/QA"/>
Description 7:	<input type="text" value="Link 7"/>	URL 7:	<input type="text" value="https://fibre.zenglobal.net/QA"/>
Description 8:	<input type="text" value="Link 8"/>	URL 8:	<input type="text" value="https://fibre.zenglobal.net/QA"/>
Description 9:	<input type="text" value="Link 9"/>	URL 9:	<input type="text" value="https://fibre.zenglobal.net/QA"/>
Description 10:	<input type="text" value="Link 10"/>	URL 10:	<input type="text" value="https://fibre.zenglobal.net/QA"/>

Surveys		Survey#	
Description 1:	<input type="text" value="Survey 1"/>	Survey #1:	<input type="text" value="1"/>
Description 2:	<input type="text" value="Survey 2"/>	Survey #2:	<input type="text" value="2"/>
Description 3:	<input type="text" value="Survey 3"/>	Survey #3:	<input type="text" value="3"/>
Description 4:	<input type="text" value="Survey 4"/>	Survey #4:	<input type="text" value="4"/>
Description 5:	<input type="text" value="Survey 5"/>	Survey #5:	<input type="text" value="5"/>
Description 6:	<input type="text" value="Survey 6"/>	Survey #6:	<input type="text" value="6"/>
Description 7:	<input type="text" value="Survey 7"/>	Survey #7:	<input type="text" value="7"/>
Description 8:	<input type="text" value="Survey 8"/>	Survey #8:	<input type="text" value="8"/>
Description 9:	<input type="text" value="Survey 9"/>	Survey #9:	<input type="text" value="9"/>
Description 10:	<input type="text" value="Survey 10"/>	Survey #10:	<input type="text" value="10"/>

**Note:** Make sure the **Description** matches up with the right **Survey #** field.

The screenshot shows the same form as above, but with a yellow rectangular box highlighting the 'Survey #1' field in the 'Survey#' section and the 'Description 1' field in the 'Links' section. This highlights the requirement that the description must match the survey number.

3. Press .

7. Select where in the body you want your survey link to appear.

8. Type the sentence that you want to introduce the survey with.



9. Type <<SURVEY\_>>, where \_ is the number of the survey in the Links screen.

For example, if you are only sending one survey: [Take our latest survey here:](#)  
<<SURVEY1>>.

If you wanted to link the third survey you had listed in the Links screen, type  
<<SURVEY3>>.

See *Using merge fields to customise mail outs* on page 160.

10. Press .

The survey is linked to the email.

## Creating and sending a marketing mail out

Create and send a marketing mail out to send marketing information or surveys to your customers.

**Tip:** This procedure is easier if you create your filters to select the customers to send mail outs to first. See *Creating a new filter* on page 131.

To create and send a marketing mail out:

1. Create the mail out you want to send to your targeted customers.

See *Creating a new email mail out* on page 158.

The screenshot shows the 'Email Detail Maintenance Amc master' interface. It includes a menu bar with 'Edit', 'View', 'Insert', 'Table', 'Format', and 'Tools'. Below the menu are buttons for 'Formats', 'Font Family', 'Font Sizes', 'B', 'I', and text alignment options. The main text area contains the following content: '<<VIEW>> Test 4', 'Place your Text or images here', '<<OPTOUT>>', and 'This email was sent to <<EMAIL>> because you registered with us. You may <<OPTOUT>>'. Below the text area is a 'Subject' field with 'Test 4', 'From Name' field, and 'Return Email' field. At the bottom right, there are buttons for 'Help', 'Hints', 'Evaluate', 'Links', 'New', 'Delete', 'Save', and 'Generate'.

**Tip:** Remember to use merge tags to personalise your mail out to your new customers. See *Using merge fields to customise mail outs* on page 160.

2. Link any surveys you want to include.

See *Linking a survey in a mail out* on page 165.

3. Press **Generate**.

The Marketing Surveys report is displayed.

## Marketing Surveys - Email Out

Description	Survey #	Enabled	Questions	Filters	Responses	External Form	Created	Updated	Style	User
<a href="#">Bob Test Survey</a>	2	✓	8	0	13		06 MAY 2008	08 SEP 2009	Tree Survey	Bob
<a href="#">Clives Survey</a>	25	✓	1				11 MAY 2014	11 MAY 2014	Tasmani Devil	Clive

Add to Favourites

Create New Survey

**Note:** The exact report you see depends on whether you are sending an email or an SMS. See *Marketing Surveys Email Out report* on page 197. Also see *Marketing Surveys SMS Out report* on page 219.

- Press the Description field of the survey you want to use as a filter for who you send the mail out to.

**Note:** This may not be the survey you linked to the email.

For example, you may want to send a mail out to customers who have indicated on a previous survey that they're interested in furniture. In this case, you would select the furniture survey to filter the results on.

As another example, you may want to re-send the survey out to anyone who has not responded. In this case, you would select the survey you are sending, so you can filter on "not responded" results.

A popup menu is displayed.

## Marketing Surveys - Email Out

Description	Survey #	Enabled	Questions	Filters	Responses	External Form	Created	Updated	Style	User
<a href="#">Bob Test Survey</a>	2	✓	8	0	13		6/05/2008	8/04/2011	Tree Survey	demo
<a href="#">Clives Survey</a>	25	✓	1				11/05/2014	11/05/2014	Tasmani Devil	Clive
<a href="#">First Survey</a>	1	✓	3	0	7		5/05/2008	2/06/2008	Tasmani	Bob

Add to Favourites

Create New Survey

- If you want to use a filter you have already created for this survey, press **Run Survey**.
- If you want to create a new filter, or view the filters you have created, press **Edit Survey**.

See *Creating a new filter* on page 131.

**Tip:** Once you have created your filter, press the browser Back button until you see the Marketing Surveys report again. Press the **Description** field of the survey you created the filter for and press **Run Survey**.



The Run Survey report is displayed.

Description	Filter #	Enabled	Questions	Created	Updated	User	Count
All							1,591
All Respondent							13
Non Respondent							1,578
Test Filter	1	✓	8	27/05/2008	27/05/2008	Bob	8

**Extra**  
Marketing only

**Options**  
Opt In Email

**Merge Form**  
Market Test email

**Offer**  
None

**Job**  
171

**Birth Month**  
None

**Age Range**  
None

**Gender**  
Both

**Names**  
None

**Email**

[Having troubles reading. Click here](#)

First Name Fred bob 111  
 Last Name Smith  
 Site 1  
 Site Name AMC  
 Company -1  
 Company Name AMC Master  
 Address Address Line 1  
 Address 1 Address Line 1  
 Address 2 Address Line 2  
 Address 3 Address Line 3  
 Suburb The Suburb  
 State The State  
 Postcode ThePostCode  
 Country Australia

- Press the **Description** of the filter you want to use.  
A popup menu is displayed.

The screenshot displays a marketing management interface. On the left, there is a 'Parameters' table with columns: Description, Filter #, Enabled, Questions, Created, Updated, User, and Count. The table lists several filters, with 'Test F' selected and a context menu open over it. The context menu options are: Download this Selection, Send Now, Send Later, and Display this Selection. Below the table is an 'Email' preview window showing a list of fields: First Name Fred bob 111, Last Name Smith, Site 1, Site Name AMC, Company -1, Company Name AMC Master, Address Address Line 1, Address 1 Address Line 1, Address 2 Address Line 2, Address 3 Address Line 3, Suburb The Suburb, State The State, Postcode ThePostCode, and Country Australia. On the right side, there are several configuration sections: 'Extra' (Marketing only), 'Options' (Opt In Email), 'Merge Form' (Market Test email), 'Offer' (None), 'Job' (171), 'Birth Month' (None), 'Age Range' (None), 'Gender' (Both), and 'Names' (None).

Description	Filter #	Enabled	Questions	Created	Updated	User	Count
All							1,591
All Respondent							13
Non Respondent							1,578
Test F			8	27/05/2008	27/05/2008	Bob	8

**Extra**  
Marketing only

**Options**  
Opt In Email

**Merge Form**  
Market Test email

**Offer**  
None

**Job**  
171

**Birth Month**  
None

**Age Range**  
None

**Gender**  
Both

**Names**  
None

8. Press **Send Now**.

The mail out is sent.

## Creating a marketing mail out to be sent later

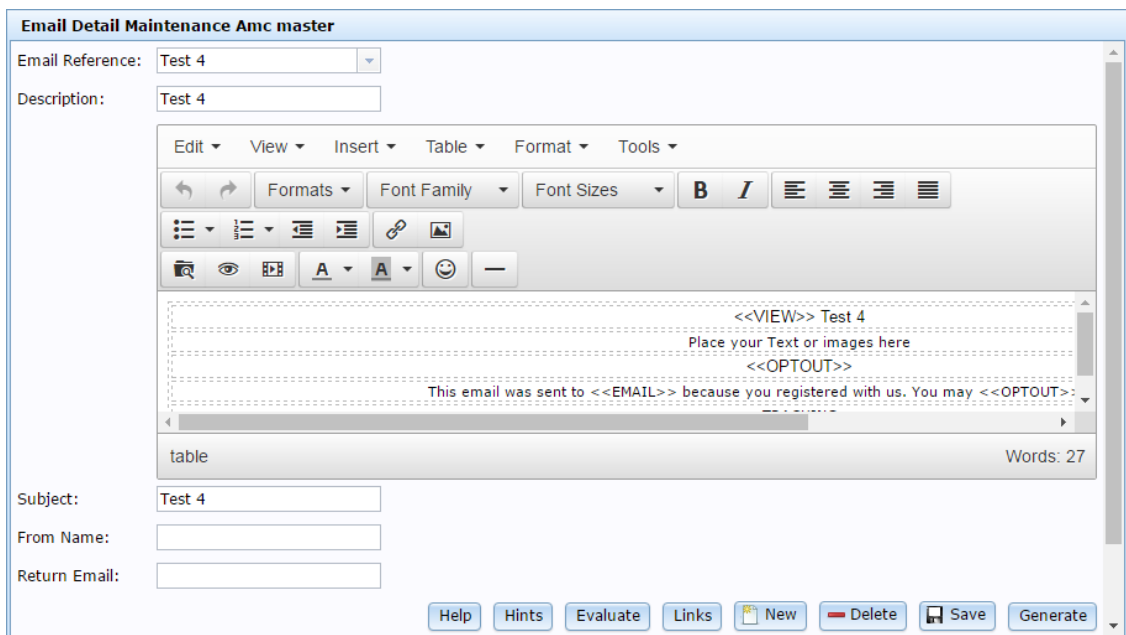
Create a marketing email out to be sent later to plan your mail outs in advance.

**Tip:** This procedure is easier if you create your filters to select the customers to send mail outs to first. See *Creating a new filter* on page 131.

To create a marketing mail out to send later:

1. Create the mail out you want to send to your targeted customers.

See *Creating a new email mail out* on page 158.



**Tip:** Remember to use merge tags to personalise your mail out to your new customers. See *Using merge fields to customise mail outs* on page 160.

2. Link any surveys you want to include.

See *Linking a survey in a mail out* on page 165.

3. Press **Generate**.

The Marketing Surveys report is displayed.

## Marketing Surveys - Email Out

Description	Survey #	Enabled	Questions	Filters	Responses	External Form	Created	Updated	Style	User
<a href="#">Bob Test Survey</a>	2	✓	8	0	13		06 MAY 2008	08 SEP 2009	Tree Survey	Bob
<a href="#">Clives Survey</a>	25	✓	1				11 MAY 2014	11 MAY 2014	Tasmani Devil	Clive

Add to Favourites

Create New Survey

**Note:** The exact report you see depends on whether you are sending an email or an SMS. See *Marketing Surveys Email Out report* on page 197. Also see *Marketing Surveys SMS Out report* on page 219.

4. Press the Description field of the survey you want to use as a filter for who you send the mail out to.

**Note:** This may not be the survey you linked to the email.

For example, you may want to send a mail out to customers who have indicated on a previous survey that they're interested in furniture. In this case, you would select the furniture survey to filter the results on.

As another example, you may want to re-send the survey out to anyone who has not responded. In this case, you would select the survey you are sending, so you can filter on "not responded" results.

A popup menu is displayed.

## Marketing Surveys - Email Out

Description	Survey #	Enabled	Questions	Filters	Responses	External Form	Created	Updated	Style	User
<a href="#">Bob Test Survey</a>	2	✓	8	0	13		6/05/2008	8/04/2011	Tree Survey	demo
<a href="#">Clives Survey</a>	25	✓	1				11/05/2014	11/05/2014	Tasmani Devil	Clive
<a href="#">First Survey</a>	1	✓	3	0	7		5/05/2008	2/06/2008	Tasmani	Bob

Add to Favourites

Create New Survey

5. If you want to use a filter you have already created for this survey, press **Run Survey**.
6. If you want to create a new filter, or view the filters you have created, press **Edit Survey**.

See *Creating a new filter* on page 131.

**Tip:** Once you have created your filter, press the browser Back button until you see the Marketing Surveys report again. Press the **Description** field of the survey you created the filter for and press **Run Survey**.

Marketing Surveys - Email Out

Descrpt Survey #	Enabled	Question Filters	Respon External Form	Created	Updated	Style	User
Bob Test Survey	2	✓	0 0 13	06 MAY 2008	01 SEP 2009	Tree Survey	Bob
Clive's Survey	25	✓	1	11 MAY 2014	11 MAY 2014	Tasmani Clive Devl	

Buttons: Add to Favourites, Create New Survey

The Run Survey report is displayed.

Description	Filter #	Enabled	Questions	Created	Updated	User	Count
All							1,591
All Respondent							13
Non Respondent							1,578
Test Filter	1	✓	8	27/05/2008	27/05/2008	Bob	8

Email	
<a href="#">Having troubles reading. Click here</a>	
First Name	Fred bob 111
Last Name	Smith
Site	1
Site Name	AMC
Company -1	
Company Name	AMC Master
Address Address Line 1	
Address 1 Address Line 1	
Address 2 Address Line 2	
Address 3 Address Line 3	
Suburb	The Suburb
State	The State
Postcode	ThePostCode
Country	Australia

<b>Extra</b>	Marketing only
<b>Options</b>	Opt In Email
<b>Merge Form</b>	Market Test email
<b>Offer</b>	None
<b>Job</b>	171
<b>Birth Month</b>	None
<b>Age Range</b>	None
<b>Gender</b>	Both
<b>Names</b>	None

- Press the **Description** of the filter you want to use.  
A popup menu is displayed.



The screenshot shows a 'Parameters' table with columns: Description, Filter #, Enabled, Questions, Created, Updated, User, and Count. The 'Test F' row is selected, and a context menu is open over it with options: Download this Selection, Send Now, Send Later, and Display this Selection. Below the table is an 'Email' preview window showing a list of fields: First Name Fred bob 111, Last Name Smith, Site 1, Site Name AMC, Company -1, Company Name AMC Master, Address Address Line 1, Address 1 Address Line 1, Address 2 Address Line 2, Address 3 Address Line 3, Suburb The Suburb, State The State, Postcode ThePostCode, and Country Australia. To the right is a sidebar with various filters: Extra (Marketing only), Options (Opt In Email), Merge Form (Market Test email), Offer (None), Job (171), Birth Month (None), Age Range (None), Gender (Both), and Names (None).

8. Press **Send Later**.

The Batch Maintenance screen is displayed.

The screenshot shows the 'Batch Maintenance - Job 171' screen. At the top, the 'Company' is set to 'AMC Master'. Below is a 'Batches' section with a table containing one row of data:

View	Site	Home Site	System ID	Reference	Batch	Date	Hour	Minute	Amount	Count
<a href="#">View</a>	All	All	Market Email	Market Test email	71	9/08/2016	3 AM	0	\$0	8

At the bottom right of the table area, there are 'Update' and 'Delete' buttons.

See *Batch Maintenance* screen on page 229.

9. Select the batch you want to edit in the job.

## Managing marketing and surveys

**Batch Maintenance - Job 171**

Company:

Batches

View	Site	Home Site	System ID	Reference	Batch	Date	Hour	Minute	Amount	Count
<a href="#">View</a>	All	All	Market Email	Market Test email	71	9/08/2016	3 AM	0	\$0	8

10. Select the date you want to send the mail out in the **Date** field.
11. Select the time you want to send the mail out in the **Hour** and **Minute** fields.
12. If you want to limit the amount spent during this mail out, type the maximum amount to spend in the **Amount** field.

**Tip:** This can prevent SMS costs being higher than expected if you have accidentally created an SMS that is too long for one message.

13. Press .

The scheduled mail out is created.

## Creating a marketing mail out triggered by an event

Create a marketing email out triggered by an event to automatically mail new customers with a survey or other material when they join your company.

This procedure involves several large steps:

1. Creating the mail out you want to send and linking the surveys.
2. Filtering your list of customers by their other survey responses to select the customers you want to send the mail out to.
3. Recording the job number.
4. Creating the event to trigger the mail out, and adding the job number to it.

## Creating a triggered mail out

To create a marketing mail out triggered by an event:

1. Create the mail out you want to send to your targeted customers.

See *Creating a new email mail out* on page 158.

Email Reference: Test 4

Description: Test 4

Subject: Test 4

From Name:

Return Email:

Words: 27

**Tip:** Remember to use merge tags to personalise your mail out to your new customers. See *Using merge fields to customise mail outs* on page 160.

2. Link any surveys you want to include.

See *Linking a survey in a mail out* on page 165.

3. Press **Generate**.

The Marketing Surveys report is displayed.

### Marketing Surveys - Email Out

Descripti	Survey #	Enabled	Question	Filters	Respond	External Form	Created	Updated	Style	User
<a href="#">Bob Test Survey</a>	2	✓	8	0	13		06 MAY 2008	08 SEP 2009	Tree Survey	Bob
<a href="#">Clives Survey</a>	25	✓	1				11 MAY 2014	11 MAY 2014	Tasmani Devil	Clive

Add to Favourites

Create New Survey

**Note:** The exact report you see depends on whether you are sending an email or an SMS. See *Marketing Surveys Email Out report* on page 197. Also see *Marketing Surveys SMS Out report* on page 219.

4. Press the **Description** field of the survey you want to use as a filter for who you send the mail out to.

**Note:** This may not be the survey you linked to the email.

For example, you may want to send a mail out to customers who have indicated on a previous survey that they're interested in furniture. In this case, you would select the furniture survey to filter the results on.

As another example, you may want to re-send the survey out to anyone who has not responded. In this case, you would select the survey you are sending, so you can filter on "not responded" results.

A popup menu is displayed.

### Marketing Surveys - Email Out

Descripti	Survey #	Enabled	Question	Filters	Respond	External Form	Created	Updated	Style	User
<a href="#">Bob Test Survey</a>	2	✓	8	0	13		6/05/2008	8/04/2011	Tree Survey	demo
<a href="#">Clives Survey</a>	25	✓	1				11/05/2014	11/05/2014	Tasmani Devil	Clive
<a href="#">First</a>	1	✓	3	0	7		5/05/2008	2/06/2008	Tasmani	Bob

Add to Favourites

Create New Survey

5. If you want to use a filter you have already created for this survey, press **Run Survey**.
6. If you want to create a new filter, or view the filters you have created, press **Edit Survey**.

See *Creating a new filter* on page 131.

**Tip:** Once you have created your filter, press the browser Back button until you see the Marketing Surveys report again. Press the **Description** field of the survey you created the filter for and press **Run Survey**.

Marketing Surveys - Email Out

Descrpt Survey #	Enabled	Question Filters	Respon External Form	Created	Updated	Style	User
Bob Test Survey	2	✓	0 0 13	06 MAY 2008	01 SEP 2009	Tree Survey	Bob
Clive's Survey	25	✓	1	11 MAY 2014	11 MAY 2014	Tasmani Clive Dev	

Buttons: Add to Favourites, Create New Survey

The Run Survey report is displayed.

Description	Filter #	Enabled	Questions	Created	Updated	User	Count
All							1,591
All Respondent							13
Non Respondent							1,578
Test Filter	1	✓	8	27/05/2008	27/05/2008	Bob	8

Parameters

Extra: Marketing only

Options: Opt In Email

Merge Form: Market Test email

Offer: None

Job: 171

Birth Month: None

Age Range: None

Gender: Both

Names: None

Email

[Having troubles reading. Click here](#)

First Name Fred bob 111  
 Last Name Smith  
 Site 1  
 Site Name AMC  
 Company -1  
 Company Name AMC Master  
 Address Address Line 1  
 Address 1 Address Line 1  
 Address 2 Address Line 2  
 Address 3 Address Line 3  
 Suburb The Suburb  
 State The State  
 Postcode ThePostCode  
 Country Australia

7. Write down the number in the **Job** filter field.

## Managing marketing and surveys

The screenshot displays a marketing management interface. On the left, there is a 'Parameters' table with the following data:

Description	Filter #	Enabled	Questions	Created	Updated	User	Count
All							1,591
All Respondent							13
Non Respondent							1,578
Test Filter	1	✓	8	27/05/2008	27/05/2008	Bob	8

Below the table is an 'Email' preview window showing a list of fields: First Name Fred bob 111, Last Name Smith, Site 1, Site Name AMC, Company -1, Company Name AMC Master, Address Address Line 1, Address 1 Address Line 1, Address 2 Address Line 2, Address 3 Address Line 3, Suburb The Suburb, State The State, Postcode ThePostCode, and Country Australia. A link 'Having troubles reading. Click here' is also visible.

On the right side, there is a sidebar with several filter options, each with a dropdown arrow:

- Extra: Marketing only
- Options: Opt In Email
- Merge Form: Market Test email
- Offer: None
- Job: 171 (highlighted with a yellow box)
- Birth Month: None
- Age Range: None
- Gender: Both
- Names: None

**Note:** It is very important to record this number. This is how you link the email and filters to the marketing event.

8. Press the Description of the filter you want to use.  
A popup menu is displayed.

The screenshot shows a marketing management interface. On the left, there is a 'Parameters' table with columns: Description, Filter #, Enabled, Questions, Created, Updated, User, and Count. The table lists several filters, with 'Test F' selected. A context menu is open over 'Test F', showing options: 'Download this Selection', 'Send Now', 'Send Later', and 'Display this Selection'. Below the table is an 'Email' preview window showing a sample email body with fields like 'First Name Fred bob 111', 'Last Name Smith', 'Site 1', 'Site Name AMC', 'Company -1', 'Company Name AMC Master', and various address lines. On the right, there is a sidebar with several sections: 'Extra' (Marketing only), 'Options' (Opt In Email), 'Merge Form' (Market Test email), 'Offer' (None), 'Job' (171), 'Birth Month' (None), 'Age Range' (None), 'Gender' (Both), and 'Names' (None).

9. Press **Send Later**.

The Batch Maintenance screen is displayed.

The screenshot shows the 'Batch Maintenance - Job 171' screen. At the top, there is a 'Company' dropdown menu set to 'AMC Master'. Below this is a 'Batches' section containing a table with the following columns: View, Site, Home Site, System ID, Reference, Batch, Date, Hour, Minute, Amount, and Count. The table contains one row: 'View', 'All', 'All', 'Market Email', 'Market Test email', '71', '9/08/2016', '3 AM', '0', '\$0', '8'. At the bottom right of the table, there are two buttons: 'Update' and 'Delete'.



10. Select the batch.

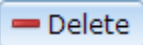
**Batch Maintenance - Job 171**

Company: AMC Master

Batches

View	Site	Home Site	System ID	Reference	Batch	Date	Hour	Minute	Amount	Count
<a href="#">View</a>	All	All	Market Email	Market Test email	71	9/08/2016	3 AM	0	\$0	8

11. Press .
12. Create or open the marketing event you want to trigger the mail out.





See *Creating a marketing event* on page 46

The Marketing Event Maintenance screen is displayed.

**Marketing Event Maintenance**

Editing Marketing "[9]"

Event Id: 9	Day: Every Day
Description: Test welcome	Month: Every Month
Event Type: Market Welcome	Year: Every Year
Start Date: 4/07/2016	Enabled: Yes
Expiry Date: 5/07/2017	Site: All
Start Hour: Midnight	location Exceptions ( eg 1,2,3 ):
End Hour: 11 PM	SMS Job: 0
How Often: Single Event During Perioc	Email Job: 0
	SMS Message:
	Return Email Address:
	Email Subject:
	Email Message:

13. Type the job number you recorded earlier in the SMS Job or Email Job fields.

**Note:** Make sure you record in the appropriate field. If you created an SMS mail out for this process, type the job number in the **SMS Job** field. If you created an email mail out, type the job number in the **Email Job** field.

14. Press .



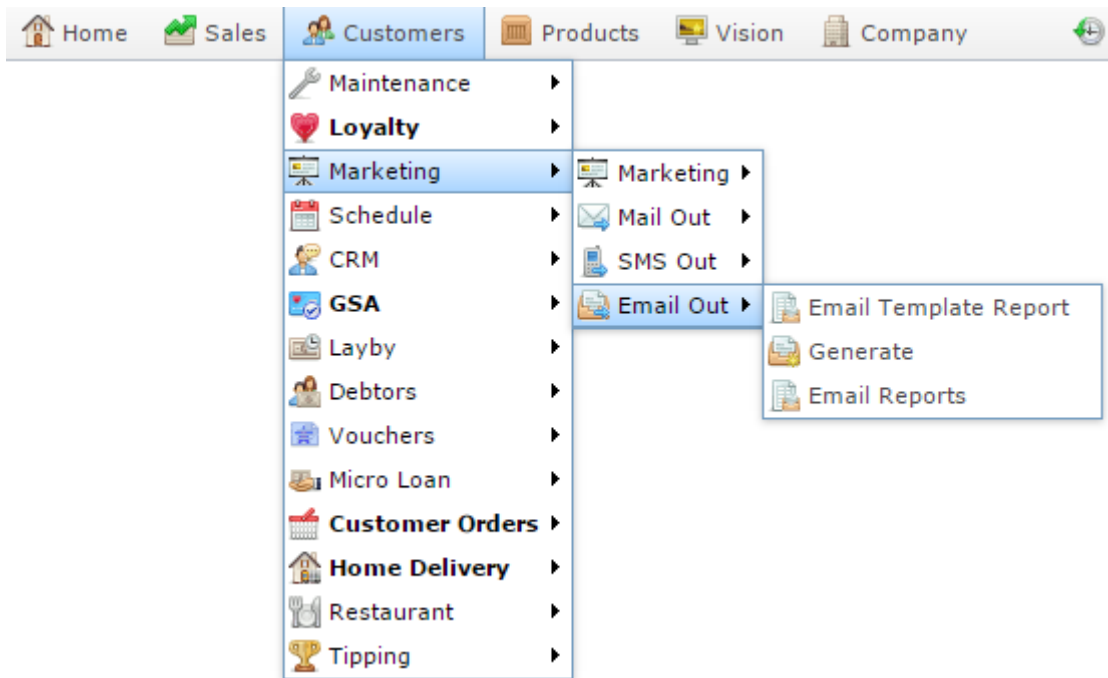
The triggered mail out is created.

## Editing email mail outs

Edit an email mail out to change the email you send with surveys.

To edit an email mail out:

1. Press  Customers.
2. Press Marketing > Email Out > Email Template Report.



The Email Templates report is displayed.

### Email Templates Report

Description	Subject	Size (K)	Changed
<a href="#">Test 4</a>	Test 4		1 24 Jan 2016
<a href="#">Test 3</a>	test 3		1 22 Jan 2016
<a href="#">Test Market</a>	Test		1 22 Jan 2016
<a href="#">Market Test email</a>	Marketing email test		7 22 Jan 2016

Type

Emails

Add to Favourites

Create

3. Press the **Description** of the email or email template you want to view.

A popup menu is displayed.

## Email Templates Report

Description	Subject	Size (K)	Changed
Market Test email	Marketing email test	7	23 Jun 2016
Test 4	Test email subject	2	08 Apr 2016
Test 4	Test 4	1	24 Jan 2016
Test 3	test 3	1	22 Jan 2016
Test Market	Test	1	22 Jan 2016

Type

Emails

Add to Favourites

Create

4. Press **Edit**.

The Email Detail Maintenance screen is displayed.

**Email Detail Maintenance Amc master**

Email Reference:

Description:

Edit View Insert Table Format Tools

<<VIEW>> Test 4  
 Place your Text or images here  
 <<OPTOUT>>  
 This email was sent to <<EMAIL>> because you registered with us. You may <<OPTOUT>>

table Words: 27

Subject:

From Name:

Return Email:

5. Edit the email as required.

See *Email Detail Maintenance* screen on page 193.

6. Press .

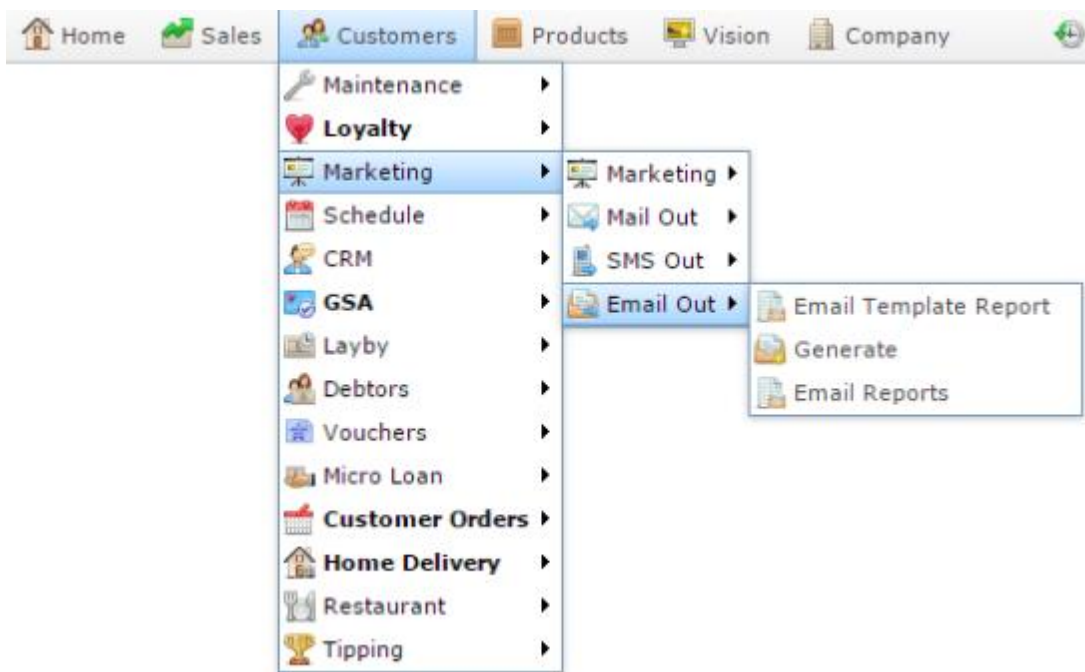
The email is saved.

## Deleting email mail outs

Delete an email if you don't want it used to send surveys.

To delete an email mail out:

1. Press  Customers.
2. Press Marketing > Email Out > Email Template Report.



The Email Templates report is displayed.

Email Templates Report

Description	Subject	Size (K)	Changed
<a href="#">Test 4</a>	Test 4	1	24 Jan 2016
<a href="#">Test 3</a>	test 3	1	22 Jan 2016
<a href="#">Test Market</a>	Test	1	22 Jan 2016
<a href="#">Market Test email</a>	Marketing email test	7	22 Jan 2016

Type:

3. Press the **Description** of the email or email template you want to view.  
A popup menu is displayed.

### Email Templates Report

Description	Subject	Size (K)	Changed
Market Test email	Marketing email test	7	23 Jun 2016
Test 4	Test email subject	2	08 Apr 2016
Test 4	Test 4	1	24 Jan 2016
Test 3	test 3	1	22 Jan 2016
Test Market	Test	1	22 Jan 2016

Type

Emails

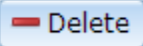
Add to Favourites

Create

4. Press Edit.

The Email Detail Maintenance screen is displayed.

The screenshot shows the 'Email Detail Maintenance Amc master' interface. At the top, the 'Email Reference' is set to 'Test 4'. Below this, the 'Description' field contains 'Test 4'. A rich text editor is visible, featuring a menu with 'Edit', 'View', 'Insert', 'Table', 'Format', and 'Tools'. The editor toolbar includes icons for undo, redo, bold, italic, bulleted list, numbered list, link, unlink, image, and text color. The main content area of the editor contains the following text: '<<VIEW>> Test 4', 'Place your Text or images here', and '<<OPTOUT>>'. Below the editor, the 'Subject' field is filled with 'Test 4', and the 'From Name' and 'Return Email' fields are empty. At the bottom of the screen, there is a row of buttons: 'Help', 'Hints', 'Evaluate', 'Links', 'New', 'Delete', 'Save', and 'Generate'.

5. Press .

The email is deleted.

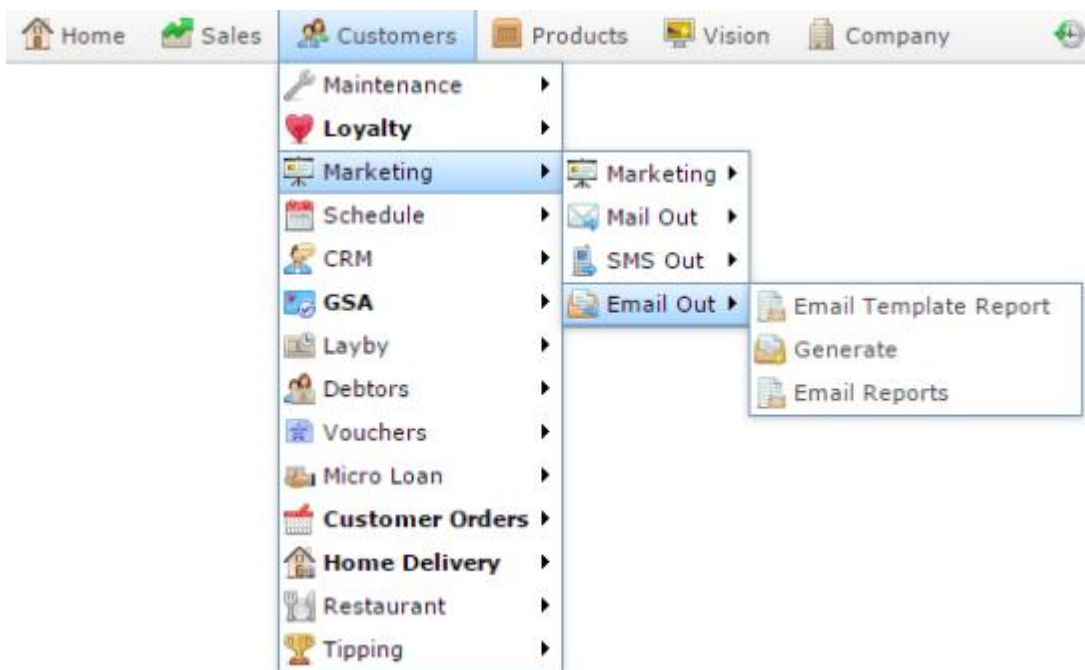
## Email Templates report

Use the Email Templates report to view emails that have been sent to customers, and view email templates.

### Opening the Email Templates report

To open the Email Templates report screen:

1. Press  Customers.
2. Press Marketing > Email Out > Email Template Report.



The Email Templates report is displayed.

Email Templates Report

Description	Subject	Size (K)	Changed	
<a href="#">Test 4</a>	Test 4		1	24 Jan 2016
<a href="#">Test 3</a>	test 3		1	22 Jan 2016
<a href="#">Test Market</a>	Test		1	22 Jan 2016
<a href="#">Market Test_email</a>	Marketing email test		7	22 Jan 2016

Type:

## Email Templates report key fields

### Filters area

Use this area to filter the results shown in the report.

---

Field	Description
<input type="button" value="Add to Favourites"/>	Press to add this report to your Portal favourites for easier access.
<input type="button" value="Create"/>	Press to create a new email template.

---

## Report area

This area displays report information.

**Note:** Not all fields may be displayed at once. Some fields depend on your filter field selections.

Field	Description
<b>Description</b>	Description of the email or SMS mail out.
<b>Reference</b>	Unique identifier for the email or SMS mail out.
<b>Subject</b>	Subject line of the email.
<b>Size (K)</b>	Size of the email in kilobytes.
<b>Changed</b>	Date the email or SMS mail out was last edited.
<b>Created</b>	Date the email or SMS mail out was created.



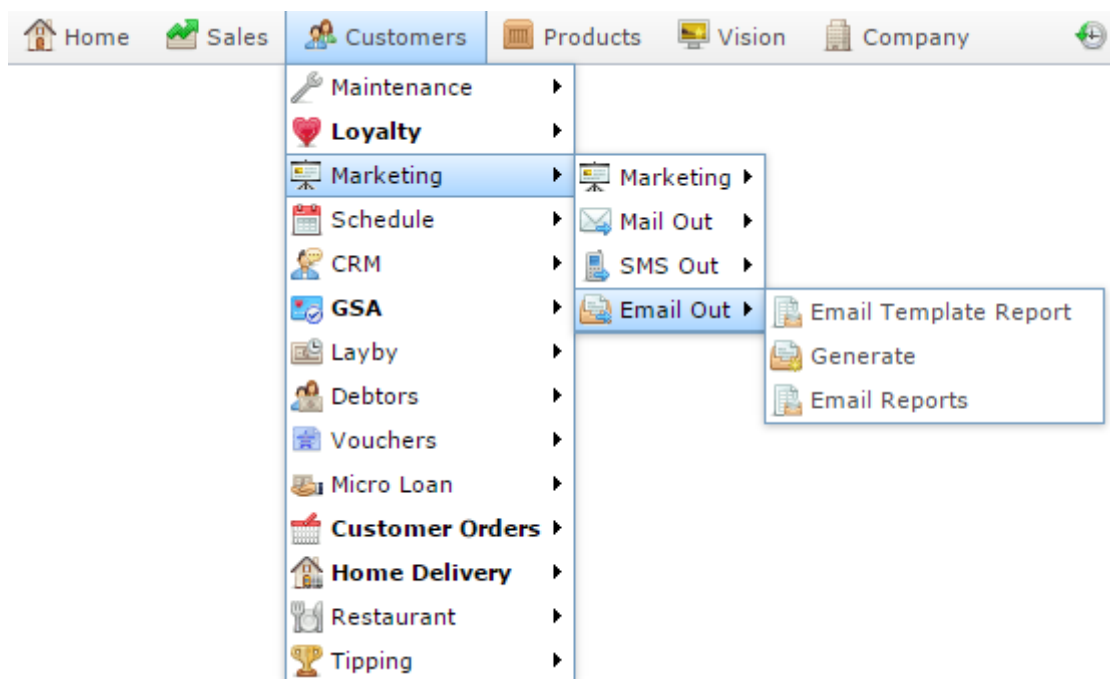
## Email Detail Maintenance screen

Use this screen to create and maintain emailed mail outs.

### Opening the Email Detail Maintenance screen

To open the Email Detail Maintenance screen:

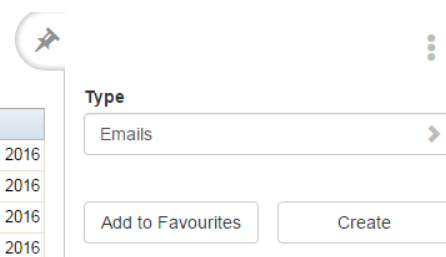
1. Press  Customers.
2. Press Marketing > Email Out > Email Template Report.



The Email Templates report is displayed.

#### Email Templates Report

Description	Subject	Size (K)	Changed	
<a href="#">Test 4</a>	Test 4		1	24 Jan 2016
<a href="#">Test 3</a>	test 3		1	22 Jan 2016
<a href="#">Test Market</a>	Test		1	22 Jan 2016
<a href="#">Market Test email</a>	Marketing email test		7	22 Jan 2016



3. Press the Description of the email or email template you want to view.  
A popup menu is displayed.

## Email Templates Report

Description	Subject	Size (K)	Changed
Market Test email	Marketing email test	7	23 Jun 2016
Test 4	Test email subject	2	08 Apr 2016
Test 4	Test 4	1	24 Jan 2016
Test 3	test 3	1	22 Jan 2016
Test Market	Test	1	22 Jan 2016

Type

Emails

Add to Favourites

Create

4. Press **Edit**.

The Email Detail Maintenance screen is displayed.

### Email Detail Maintenance Amc master

Email Reference:

Description:

Edit View Insert Table Format Tools

Formats Font Family Font Sizes **B** *I* [List Icons]

[List Icons] [Link Icon] [Image Icon]

[Image Icon] [Eye Icon] [Table Icon] [Text Color] [Background Color] [Smiley Icon] [Minus Icon]

<<VIEW>> Test 4  
Place your Text or images here  
<<OPTOUT>>  
This email was sent to <<EMAIL>> because you registered with us. You may <<OPTOUT>>

table Words: 27

Subject:

From Name:





Return Email:

Help Hints Evaluate Links New Delete Save Generate

## Email Detail Maintenance screen key fields and buttons

Field	Description
<b>Email Reference</b>	Select the email you want to view.
<b>Description</b>	Describe the email.
<b>Body</b>	Create the template of the email to send. <div data-bbox="489 846 1394 1016"><p><b>Note:</b> This editor is similar to a simple word processor, allowing you to use different fonts, colours, sizes, create lists and tables, insert images, etc.</p></div>
<b>Subject</b>	Type the subject line of the email.
<b>From Name</b>	The name that is displayed in people's inboxes indicating who the email is from.
<b>Return Email</b>	The return email address that replies from this email are sent to.
<b>Hints</b>	Press to launch a popup with some helpful hints for avoiding having your emails classified as spam.
<b>Evaluate</b>	Press to evaluate the likelihood of this email being flagged as spam.
<b>Links</b>	Press to edit the link text and URLs of your email. See <i>Linking a survey in a mail out</i> on page 165.

---

Field	Description
 New	Press to create a new Email Out template.
 Delete	Press to delete this email.
 Save	Press to save changes to the Email Out template.
 Generate	Press to generate a list of customers to send the email to. See: <ul style="list-style-type: none"><li data-bbox="541 831 1326 864">▪ <i>Creating and sending a marketing mail out</i> on page 170.</li><li data-bbox="541 887 1358 920">▪ <i>Creating a marketing mail out to be sent later</i> on page 174.</li><li data-bbox="541 943 1374 1010">▪ <i>Creating a marketing mail out triggered by an event</i> on page 179.</li></ul>


---

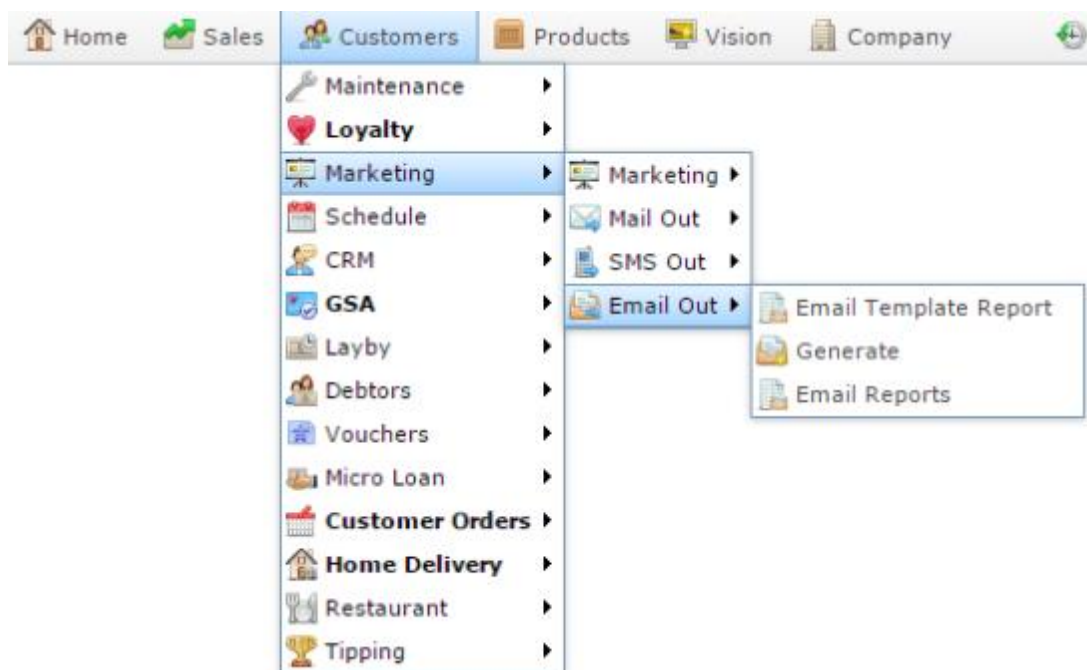
## Marketing Surveys Email Out report

Use the Marketing Surveys Email Out report to view and run marketing surveys via email.

### Opening the Marketing Surveys Email Out report

To open the Marketing Surveys Email Out report:

1. Press  Customers from the menu bar.
2. Press Marketing > Email Out > Generate.



The Marketing Surveys Email Out report is displayed.

Marketing Surveys - Email Out

[Add to Favourites](#) [Create New Survey](#)


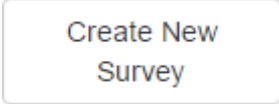
Descript	Survey #	Enabled	Question	Filters	Response	External Form	Created	Updated	Style	User
<a href="#">Bob Test Survey</a>	2	✓	8	0	13		06 MAY 2008	08 SEP 2009	Tree Survey	Bob
<a href="#">Clives Survey</a>	25	✓	1				11 MAY 2014	11 MAY 2014	Tasmani Clive Devil	Bob

## Marketing Surveys Email Out report key fields

### Filters area

Use this area to filter the results shown in the report.

---

Field	Description
	Press to add this report to your Portal favourites for easier access.
	Press to create a new survey.

---

## Report area

This area displays report information.

**Note:** Not all fields may be displayed at once. Some fields depend on your filter field selections.

Field	Description
<b>Description</b>	Description of the survey.
<b>Survey #</b>	Unique code identifying the survey.
<b>Enabled</b>	Whether the survey can be used in the Portal.
<b>Questions</b>	Number of questions the survey contains.
<b>Filters</b>	Number of filters created to examine results of this survey.
<b>Responses</b>	Number of responses received for the survey.
<b>External Form</b>	Indicates whether the survey uses an external form.
<b>Created</b>	Date the survey was created.

---

<b>Field</b>	<b>Description</b>
<b>Updated</b>	Date the survey was last updated.
<b>Style</b>	Form style the survey uses for formatting.
<b>User</b>	User who last edited the survey.

---




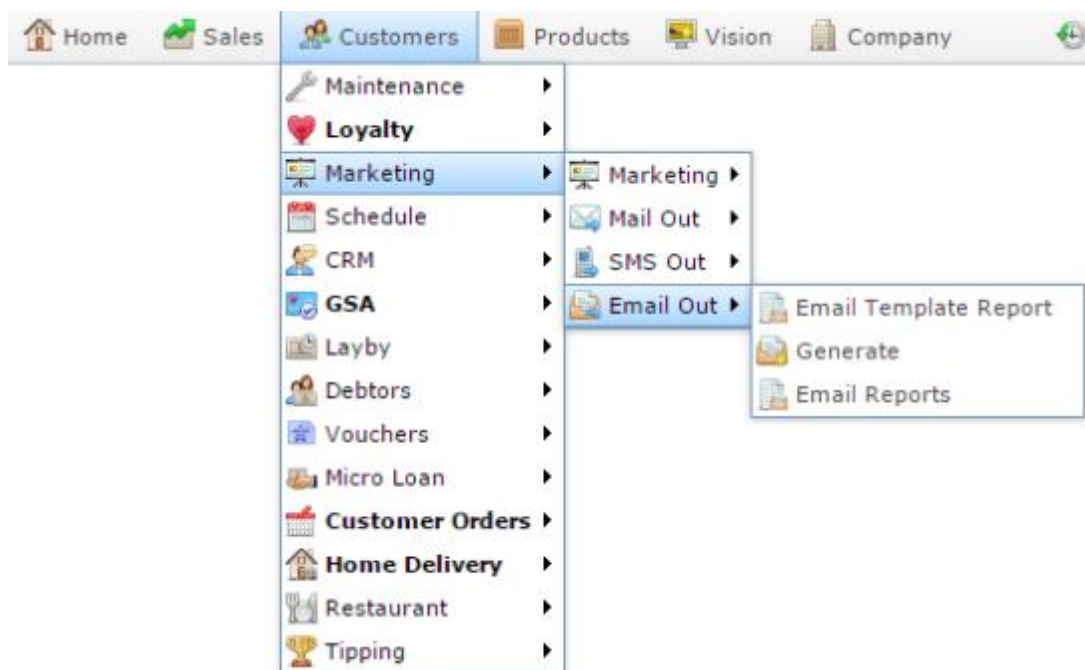
## Sites Email report

Use the Sites Email report to view emails sent by site.

### Opening the Sites Email report

To open the Sites Email report:

1. Press  Customers.
2. Press Marketing > Email Out > Email Reports.



The Sites Email report is displayed.

### Sites Email Report -> Offer Default : Job All

Site	Job	Subject	Sent Ok	Count	Opened	Viewed	Opt Out	Opt In	Confirmed	Data (K)
Chadsto	118	Welcom To Your special Club		1	0	0	0	0	0	2
<b>Total</b>				<b>1</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>2</b>

**States**

VIC >

**Site**

Chadstone >

**Date From**

8/12/2000

**Date To**

8/12/2015

**Offer**

Default >

**Job**

All >

Add to Favourites

## Sites Email report key fields

### Filters area

Use this area to filter the results shown in the report.

Field	Description
<input type="button" value="Add to Favourites"/>	Press to add this report to your Portal favourites for easier access.
<b>Site / Sites</b>	Select the site or sites to report on.
<b>Date / Date From and Date To / As of / Start Date and End Date</b>	Select the date or date period to report on.
<b>States</b>	Select a state or county to filter the report by.
<b>Offer</b>	Select a specific customer offer to report on.

<b>Field</b>	<b>Description</b>
<b>Job</b>	Select the type of communication record to display: <ul style="list-style-type: none"><li>▪ All.</li><li>▪ Loyalty Events.</li><li>▪ Lost Loyalty Password.</li><li>▪ User Messages.</li><li>▪ Alarms.</li><li>▪ Support Emails.</li><li>▪ Debtor Statements.</li><li>▪ Franchise Event.</li><li>▪ Franchise Fee.</li><li>▪ Purchase Order Submit.</li><li>▪ Purchase Order Response.</li><li>▪ Purchase Order Requisition.</li><li>▪ Scheduler.</li><li>▪ Lay Buy.</li><li>▪ Micro Loan.</li></ul>
<b>Offer</b>	Select the offer to report on.

---

## Report area

This area displays report information.

**Note:** Not all fields may be displayed at once. Some fields depend on your filter field selections.

Field	Description
<b>Site</b>	Site the email or SMS originated from.
<b>Job</b>	Job that the email or SMS relates to. For example, a loyalty event.
<b>Subject</b>	Subject line of the email.
<b>Sent OK</b>	Indicates whether the email batch was sent successfully.
<b>Count</b>	Number of emails or SMS messages sent in the batch.
<b>Opened</b>	Indicate whether this email was opened.  <b>Note:</b> Browser settings can prevent this action being detected.
<b>Viewed</b>	Indicates whether a customer clicked the View Here link to read the HTML version of the email.

---

<b>Field</b>	<b>Description</b>
<b>Opt Out</b>	Indicates whether the customer elected to opt-out of receiving further marketing material.
<b>Units</b>	The number of SMS messages sent.
<b>Cost</b>	The total cost of the SMS mail out.
<b>Opt In</b>	Indicates whether the customer elected to receive further emails from this email.
<b>Confirmation</b>	The customer has clicked a link in an email that confirms their email address is correct.
<b>Data (K)</b>	Size of the individual email.


---

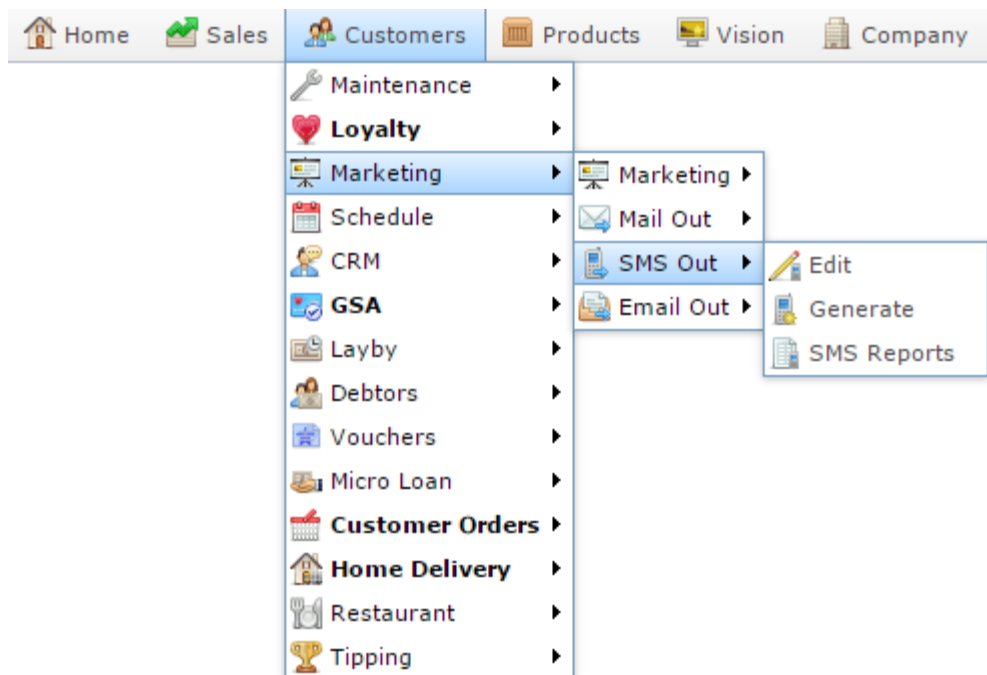
## Creating a new SMS mail out

Create an SMS mail out to send an SMS message to customers.

**Tip:** To personalise your mail outs, see *Using merge fields to customise mail outs* on page 160.

To create an SMS mail out:

1. Press  Customers.
2. Press Marketing > SMS Out > Edit.



The SMS Detail Maintenance screen is displayed.

**SMS Detail Maintenance Amc master**

Description:

SMS Opt Out Message -> Reply STOP to 0447100204 to opt out

Sender ID: Zen Global

Maximum 1 Block(s)

121 Character Left

Long URL

Short URL

3. Type a name or description in the **Description** field.
4. Type the message in the body field.

**SMS Detail Maintenance Amc master**

Description:

SMS Opt Out Message -> Reply STOP to 0447100204 to opt out

Sender ID: Zen Global

Maximum 1 Block(s)

121 Character Left

Long URL

Short URL

5. Select the sender of the SMS messages.

**SMS Detail Maintenance Amc master**

Description:

SMS Opt Out Message -> Reply STOP to 0447100204 to opt out

Maximum 1 Block(s)

121 Character Left

Long URL

Short URL



6. Select the maximum number of SMS blocks to be used in the message.

**SMS Detail Maintenance Amc master**

Description:

SMS Opt Out Message -> Reply STOP to 0447100204 to opt out

Sender ID: Zen Global

**Maximum 1 Block(s)**

121 Character Left

Long URL

Short URL

7. If you want to shorten a URL:

1. Type it into the **Long URL** field, and press .
2. Copy the **Short URL** to the mail out message.


8. Press .

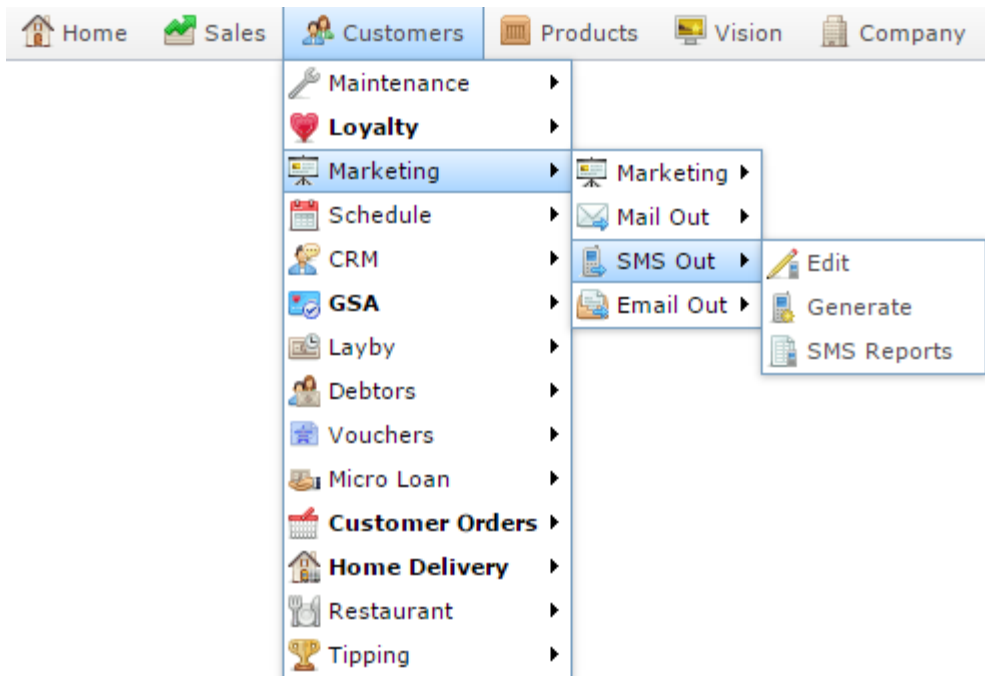
The SMS message is saved.

## Editing SMS mail outs

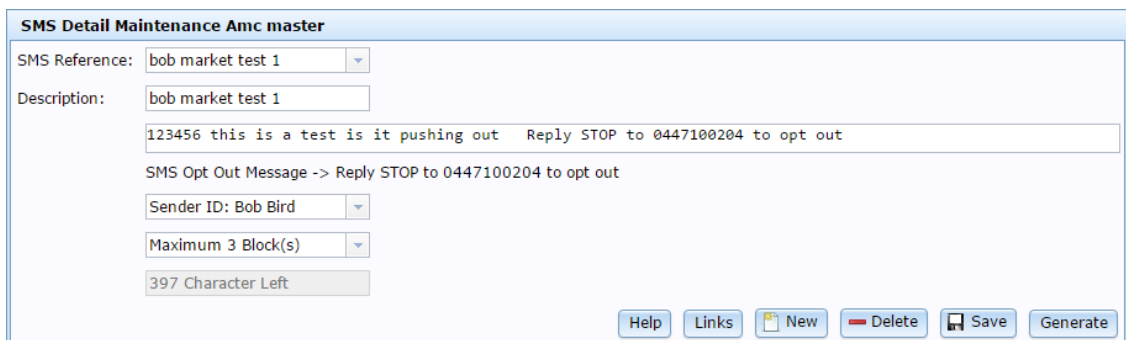
Edit an SMS mail out to change the message sent with surveys.

To edit an SMS mail out:

1. Press  Customers.
2. Press Marketing > SMS Out > Edit.



The SMS Detail Maintenance screen is displayed.

A screenshot of the 'SMS Detail Maintenance Amc master' screen. The screen displays the following fields and controls:

- SMS Reference: bob market test 1 (dropdown)
- Description: bob market test 1 (text input)
- Message body: 123456 this is a test is it pushing out Reply STOP to 0447100204 to opt out (text input)
- SMS Opt Out Message -> Reply STOP to 0447100204 to opt out (text input)
- Sender ID: Bob Bird (dropdown)
- Maximum 3 Block(s) (dropdown)
- 397 Character Left (text input)
- Buttons: Help, Links, New, Delete, Save, Generate

3. Edit the message.  
See *SMS Detail Maintenance screen* on page 212.


4. Press  Save.

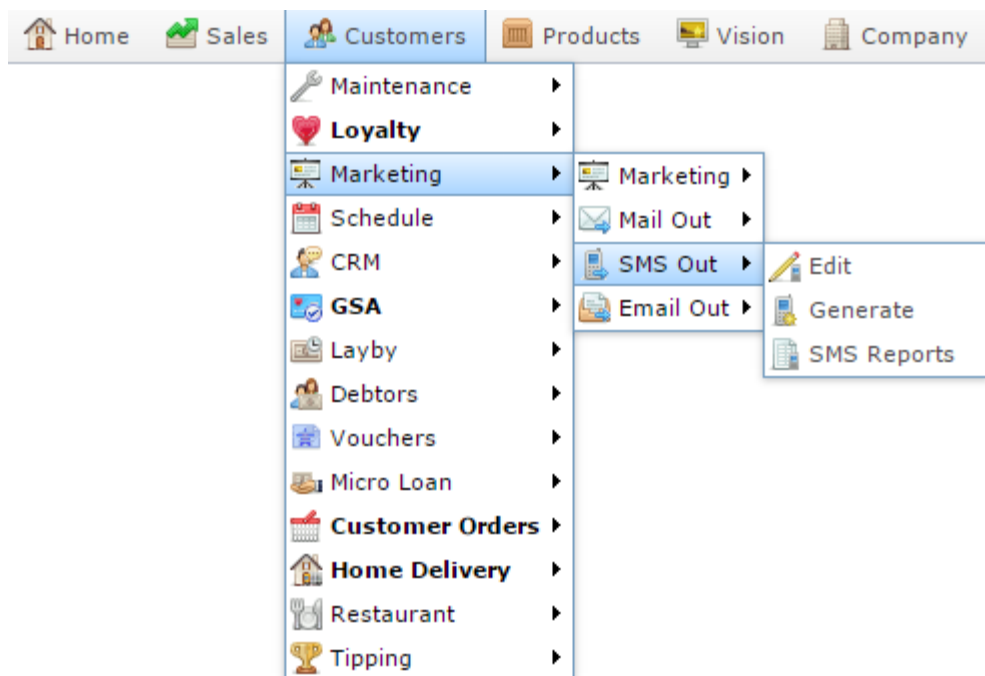
The SMS message is saved.

## Deleting SMS mail outs

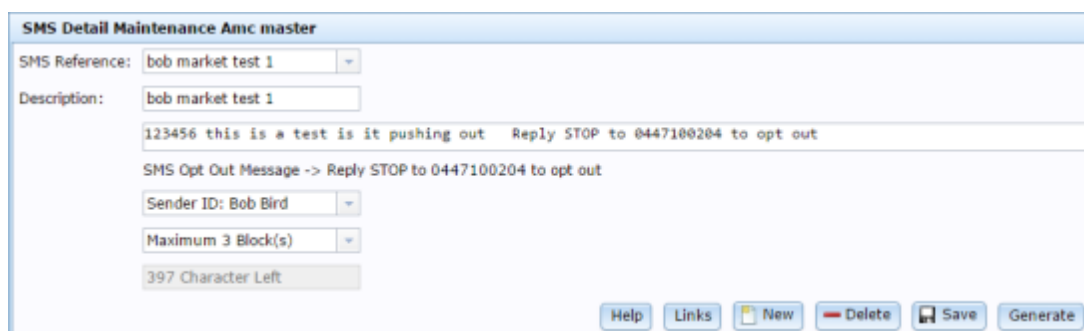
Delete an SMS mail out when you don't want it used to send surveys.

To delete an SMS mail out:

1. Press  Customers.
2. Press Marketing > SMS Out > Edit.



The SMS Detail Maintenance screen is displayed.



3. Press .


The SMS message is deleted.

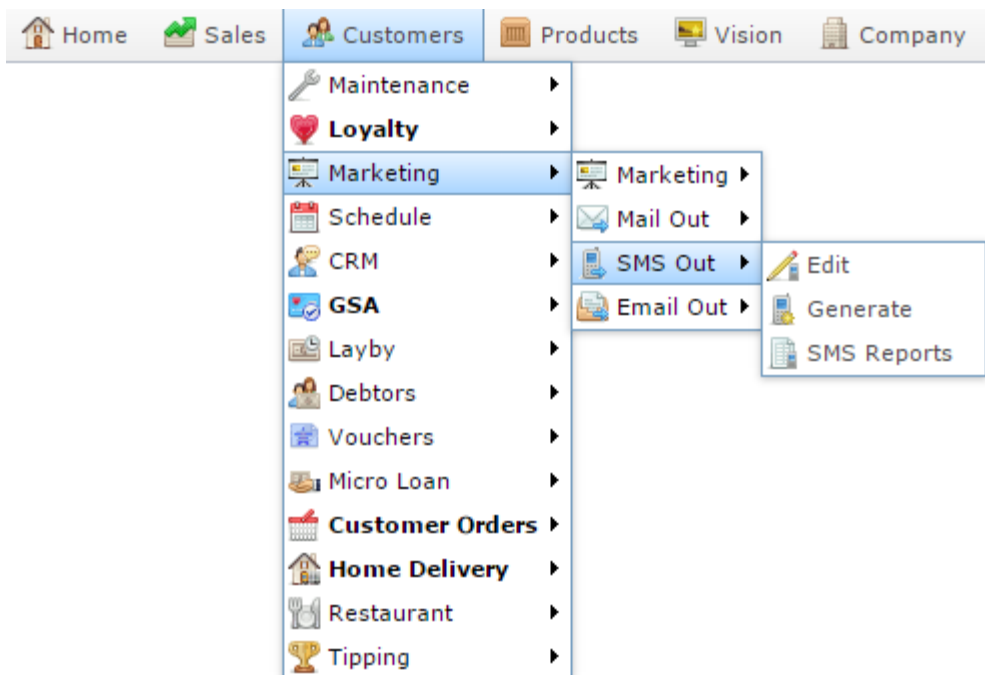
## SMS Detail Maintenance screen

Use this screen to create or edit SMS messages.

### Opening the SMS Detail Maintenance screen

To open the SMS Detail Maintenance screen:

1. Press  Customers.
2. Press Marketing > SMS Out > Edit.




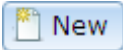
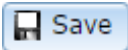
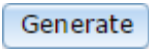
The SMS Detail Maintenance screen is displayed.



The screenshot shows the 'SMS Detail Maintenance Amc master' screen. It contains the following fields and controls:

- SMS Reference: bob market test 1
- Description: bob market test 1
- Message content: 123456 this is a test is it pushing out Reply STOP to 0447100204 to opt out
- SMS Opt Out Message -> Reply STOP to 0447100204 to opt out
- Sender ID: Bob Bird
- Maximum 3 Block(s)
- 397 Character Left
- Buttons: Help, Links, New, Delete, Save, Generate

## SMS Detail Maintenance screen key fields and buttons

Field	Description
<b>SMS Reference</b>	Identifier for the SMS.
<b>Description</b>	Describe the SMS mail out.
<b>Body</b>	Create the SMS mail out to send.
<b>Sender</b>	Select the phone address the SMS should be sent from.
<b>Maximum Block</b>	Select the maximum number of blocks of an SMS being sent.
<b>Characters Left</b>	Displays the number of characters remaining in the SMS block.
	Press to add links to the SMS.  <b>Note:</b> Sending out surveys via SMS is not recommended without shortcodes enabled.
	Press to create a new SMS.
	Press to save changes to the SMS.
	Press to generate the SMS messages.

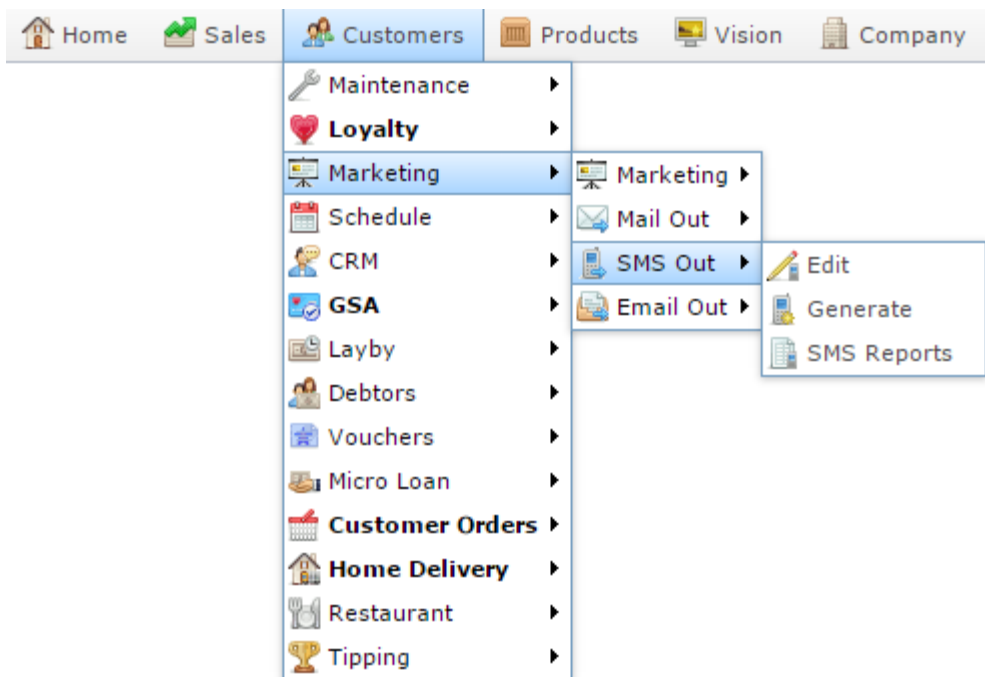
## Sites SMS Summary report

Use the Sites SMS Summary report to view the results of SMS messages sent to customers.

### Opening the Sites SMS Summary report

To open the SMS Report Options screen:

1. Press  Customers.
2. Press Marketing > SMS Out > SMS Reports.



The Sites SMS Summary report is displayed.

### Sites SMS Summary Report For Dates Between 2015-12-08 and 2015-12-08

Site	Job	Count	Units	Opt Out	Sent Ok	Cost
<b>Total</b>						

**States**

VIC >

**Site**

Chadstone >

**Date From**

8/12/2015

**Date To**

8/12/2015

**Offer**

Default >

**Job**

All >

Add to Favourites

## Sites SMS Summary report key fields

### Filters area

Use this area to filter the results shown in the report.

---

Field	Description
<input type="button" value="Add to Favourites"/>	Press to add this report to your Portal favourites for easier access.
<b>Site / Sites</b>	Select the site or sites to report on.
<b>Date / Date From and Date To / As of / Start Date and End Date</b>	Select the date or date period to report on.
<b>States</b>	Select a state or county to filter the report by.
<b>Offer</b>	Select a specific customer offer to report on.

---



---

Field	Description
<b>Job</b>	Select the type of communication record to display: <ul style="list-style-type: none"><li>▪ All.</li><li>▪ Loyalty Events.</li><li>▪ Lost Loyalty Password.</li><li>▪ User Messages.</li><li>▪ Alarms.</li><li>▪ Support Emails.</li><li>▪ Debtor Statements.</li><li>▪ Franchise Event.</li><li>▪ Franchise Fee.</li><li>▪ Purchase Order Submit.</li><li>▪ Purchase Order Response.</li><li>▪ Purchase Order Requisition.</li><li>▪ Scheduler.</li><li>▪ Lay Buy.</li><li>▪ Micro Loan.</li></ul>
<b>Offer</b>	Select the offer to report on.

---

## Report area

This area displays report information.

**Note:** Not all fields may be displayed at once. Some fields depend on your filter field selections.

Field	Description
<b>Site</b>	Site the email or SMS originated from.
<b>Job</b>	Job that the email or SMS relates to. For example, a loyalty event.
<b>Sent OK</b>	Indicates whether the email batch was sent successfully.
<b>Count</b>	Number of emails or SMS messages sent in the batch.
<b>Opt Out</b>	Indicates whether the customer elected to opt-out of receiving further marketing material.
<b>Units</b>	The number of SMS messages sent.
<b>Cost</b>	The total cost of the SMS mail out.

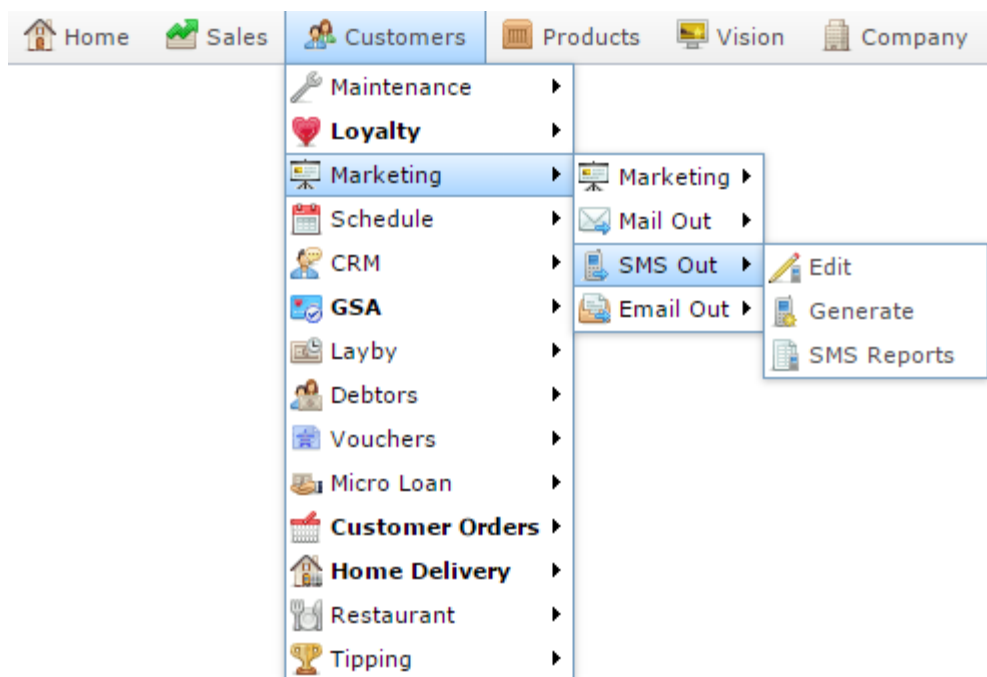
## Marketing Surveys SMS Out report

Use the Marketing Surveys SMS Out report to view and run marketing surveys via SMS.

### Opening the Marketing Surveys SMS Out report

To open the Marketing Surveys SMS Out report:

1. Press  Customers from the menu bar.
2. Press Marketing > SMS Out > Generate.



The Marketing Surveys SMS Out report is displayed.

Marketing Surveys - SMS Out

Descript	Survey #	Enabled	Question	Filters	Respon	External	Created	Updated	Style	User
<a href="#">Bob Test Survey</a>	2	✓	8	0	13		06 MAY 2008	08 SEP 2009	Tree Survey	Bob
<a href="#">Clives Survey</a>	25	✓	1				11 MAY 2014	11 MAY 2014	Tasmani Clive Devil	

Buttons: Add to Favourites, Create New Survey

## Marketing Surveys SMS Out report key fields

### Filters area

Use this area to filter the results shown in the report.

---

Field	Description
<a href="#">Add to Favourites</a>	Press to add this report to your Portal favourites for easier access.
<a href="#">Create New Survey</a>	Press to create a new survey.

---

## Report area

This area displays report information.

**Note:** Not all fields may be displayed at once. Some fields depend on your filter field selections.

Field	Description
<b>Description</b>	Description of the survey.
<b>Survey #</b>	Unique code identifying the survey.
<b>Enabled</b>	Whether the survey can be used in the Portal.
<b>Questions</b>	Number of questions the survey contains.
<b>Filters</b>	Number of filters created to examine results of this survey.
<b>Responses</b>	Number of responses received for the survey.
<b>External Form</b>	Indicates whether the survey uses an external form.
<b>Created</b>	Date the survey was created.

---

<b>Field</b>	<b>Description</b>
<b>Updated</b>	Date the survey was last updated.
<b>Style</b>	Form style the survey uses for formatting.
<b>User</b>	User who last edited the survey.


---

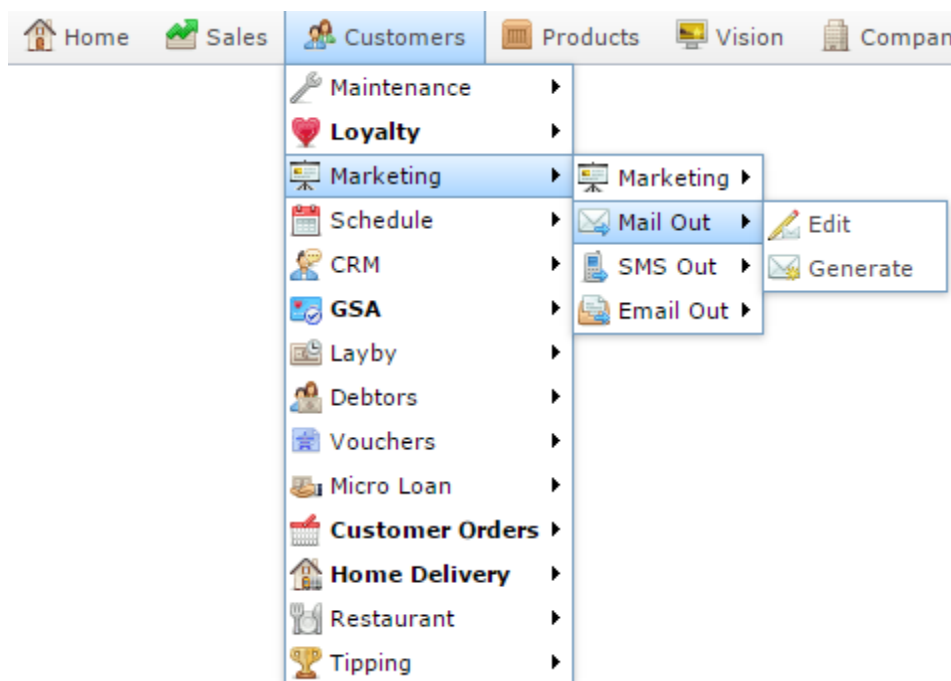
## Mail Out Detail Maintenance screen

Use this screen to create and maintain printed mail outs.

### Opening the Mail Out Detail Maintenance screen

To open the Mail Out Detail Maintenance screen:

1. Press  Customers.
2. Press Marketing > Mail Out > Edit.

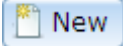
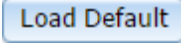


The Mail Out Detail Maintenance screen is displayed.



## Mail Out Detail Maintenance screen key fields and buttons

---

Field	Description
<b>Description</b>	Describe the mail out.
<b>Body</b>	Create the template of the mail out to send.
 <b>New</b>	Press to create a new mail out template.
 <b>Load Default</b>	Press to load the default mail out template for editing.

---



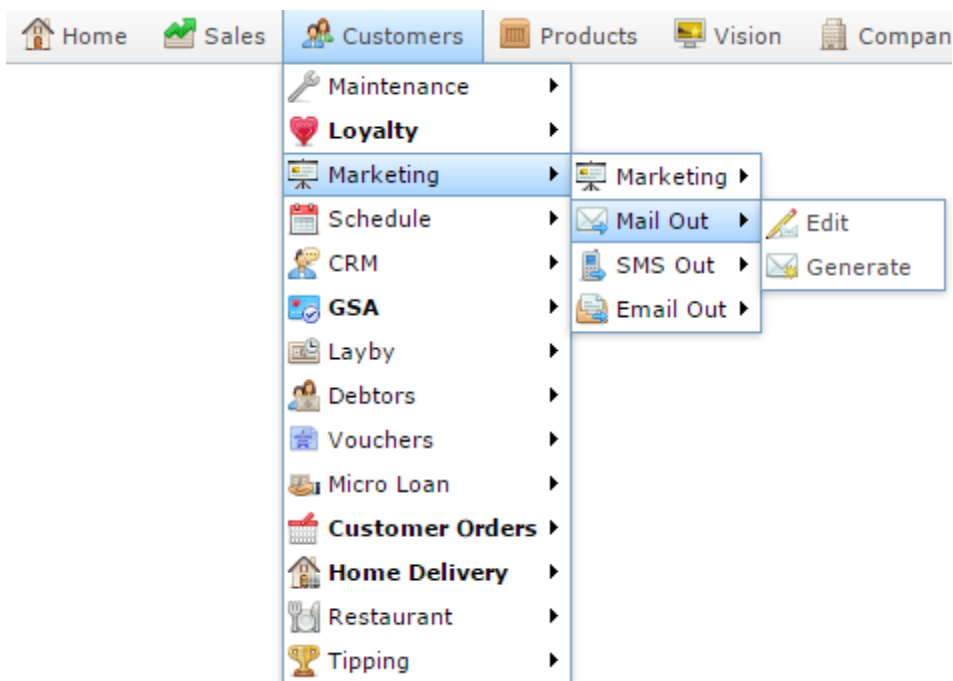
## Marketing Surveys Mail Out report

Use the Marketing Surveys Mail Out report to view and run marketing surveys via printed mail.

### Opening the Marketing Surveys Mail Out report

To open the Marketing Surveys Mail Out report:

1. Press  Customers from the menu bar.
2. Press Marketing > Mail Out > Generate.



The Marketing Surveys Mail Out report is displayed.

Marketing Surveys - Mail Out

Descript	Survey #	Enabled	Question	Filters	Respon	External Form	Created	Updated	Style	User
<a href="#">Bob Test Survey</a>	2	✓	8	0	13		06 MAY 2008	08 SEP 2009	Tree Survey	Bob
<a href="#">Clives Survey</a>	25	✓	1				11 MAY 2014	11 MAY 2014	Tasmani Clive Devil	Clive


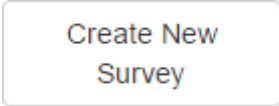
Buttons: Add to Favourites, Create New Survey

## Marketing Surveys Mail Out report key fields

### Filters area

Use this area to filter the results shown in the report.

---

Field	Description
	Press to add this report to your Portal favourites for easier access.
	Press to create a new survey.

---

## Report area

This area displays report information.

**Note:** Not all fields may be displayed at once. Some fields depend on your filter field selections.

Field	Description
<b>Description</b>	Description of the survey.
<b>Survey #</b>	Unique code identifying the survey.
<b>Enabled</b>	Whether the survey can be used in the Portal.
<b>Questions</b>	Number of questions the survey contains.
<b>Filters</b>	Number of filters created for this survey.
<b>Responses</b>	Number of customers who have completed the survey.
<b>External Form</b>	Whether the survey uses an external form.
<b>Created</b>	Date the survey was created.
<b>Updated</b>	Date the survey was last updated.

---

<b>Field</b>	<b>Description</b>
<b>Style</b>	Style the survey uses.
<b>User</b>	User who last updated the survey.

---

## Batch Maintenance screen

Use this screen to control when batched mail outs are sent automatically by the Portal. For example, to schedule a mail out for Monday morning.

### Opening the Batch Maintenance screen

To open the Batch Maintenance screen:

**Note:** The Batch Maintenance screen is only opened during the process of scheduling a mail out. See *Creating a marketing mail out to be sent later* on page 174.

1. Create the filters you want to use to list customers to send a mail out to.  
See *Creating a new filter* on page 131.
2. Prepare a mail out to send.  
See *Creating a new email mail out* on page 158.
3. Press **Generate** in the Email Maintenance screen or SMS Maintenance screen to generate the mail out.

The Marketing Surveys report is displayed.

#### Marketing Surveys - Email Out

Descript	Survey #	Enabled	Questio	Filters	Respon	External Form	Created	Updated	Style	User
<a href="#">Bob Test Survey</a>	2	✓	8	0	13		06 MAY 2008	08 SEP 2009	Tree Survey	Bob
<a href="#">Clives Survey</a>	25	✓	1				11 MAY 2014	11 MAY 2014	Tasmani Devil	Clive

Add to Favourites

Create New Survey

**Note:** The exact report you see depends on whether you are sending an email or an SMS. See *Marketing Surveys Email Out report* on page 197. Also see *Marketing Surveys SMS Out report* on page 219.

4. Press the Description field of the survey you want to use as a filter for who you send the mail out to.

A popup menu is displayed.

## Marketing Surveys - Email Out

Description	Survey #	Enabled	Questions	Filters	Respond	External Form	Created	Updated	Style	User
Bob Test	2	✓	8	0	13		6/05/200	8/04/201	Tree Survey	demo
			1				11/05/20	11/05/20	Tasmani Clive Devil	
First	1	✓	3	0	7		5/05/200	2/06/200	Tasmani	Bob

Add to Favourites

Create New Survey

5. Press Run Survey.

The Run Survey report is displayed.

Parameters							
Description	Filter #	Enabled	Questions	Created	Updated	User	Count
All							1,591
All Respondent							13
Non Respondent							1,578
Test Filter	1	✓	8	27/05/2008	27/05/2008	Bob	8

Having troubles reading. [Click here](#)

First Name Fred bob 111  
 Last Name Smith  
 Site 1  
 Site Name AMC  
 Company -1  
 Company Name AMC Master  
 Address Address Line 1  
 Address 1 Address Line 1  
 Address 2 Address Line 2  
 Address 3 Address Line 3  
 Suburb The Suburb  
 State The State  
 Postcode ThePostCode  
 Country Australia

**Extra**

Marketing only

**Options**

Opt In Email

**Merge Form**

Market Test email

**Offer**

None

**Job**

171

**Birth Month**

None

**Age Range**

None

**Gender**

Both

**Names**

None

6. Press the Description of the filter you want to use.

A popup menu is displayed.

The screenshot shows a web interface for managing marketing and surveys. On the left, there is a 'Parameters' table with columns: Description, Filter #, Enabled, Questions, Created, Updated, User, and Count. The table lists several filters, with 'Test F' selected. A context menu is open over 'Test F', showing options: 'Download this Selection', 'Send Now', 'Send Later', and 'Display this Selection'. Below the table is an 'Email' preview window showing a sample email body with fields like 'First Name Fred bob 111', 'Last Name Smith', 'Site 1', 'Site Name AMC', 'Company -1', 'Company Name AMC Master', and various address lines. On the right, a sidebar contains several sections: 'Extra' (Marketing only), 'Options' (Opt In Email), 'Merge Form' (Market Test email), 'Offer' (None), 'Job' (171), 'Birth Month' (None), 'Age Range' (None), 'Gender' (Both), and 'Names' (None).

7. Press **Send Later**.

The Batch Maintenance screen is displayed.

The screenshot shows the 'Batch Maintenance - Job 171' screen. At the top, there is a 'Company' dropdown menu set to 'AMC Master'. Below this is a 'Batches' section containing a table with the following columns: View, Site, Home Site, System ID, Reference, Batch, Date, Hour, Minute, Amount, and Count. The table contains one row of data: 'View', 'All', 'All', 'Market Email', 'Market Test email', '71', '9/08/2016', '3 AM', '0', '\$0', and '8'. At the bottom right of the table, there are two buttons: 'Update' and 'Delete'.

For more information, see *Creating a marketing mail out to be sent later* on page 174.

## Batch Maintenance screen key fields and buttons

<b>Field</b>	<b>Description</b>
<b>View</b>	Press to preview the merged email.
<b>Site</b>	The mail out will be sent to customers from this site.
<b>Home Site</b>	The mail out will be sent to customers with this home site.
<b>System ID</b>	The code identifying the mail out email or SMS to send.
<b>Reference</b>	The description of the mail out email or SMS to send.
<b>Batch</b>	The batch number of the automated sending.
<b>Date</b>	The date the mail out is scheduled for.
<b>Hour</b>	The hour the mail out is scheduled for.
<b>Minute</b>	The minute the mail out is scheduled for.
<b>Amount</b>	The maximum amount that can be spent on the mail out, if the mail out is sending SMS messages. This helps prevent accidental overspending if your SMS message exceeds the character limits.
<b>Count</b>	The number of mail outs to send in this batch.



# Glossary

## Account

An account is a general ledger structure that categorises particular kinds of income or expenditure for financial reports.

## Advertising label

An advertising label is a large label designed to advertise the price of an item.

## Appointment (Scheduler)

An appointment is an entry for a customer in the Scheduler that represents one or more specific services scheduled at a particular time for the customer. It can be retrieved by the Point of Sale and added to a transaction. Appointments can be rescheduled, cancelled or duplicated.

## Aged balance

An aged balance is an amount of money owed that has been adjusted to factor an interest rate applied over time. For example: you owe a creditor \$1000, with a 10% interest. You pay \$700, leaving \$300 still to pay. After the interest period elapses, 10% interest is applied to the remaining \$300. Your aged balance is now \$330.

## Balance

A balance is the total amount of money owed either by yourself to a creditor, or by a debtor to you. A balance may be:

- Positive, indicating money is owed.
- Zero, indicating no money is owed.
- Negative, indicating the party who owed money has over-paid. For example, if you pay a creditor \$1000 when you only owed \$999, your balance would be -\$1.

## Barcode

A barcode is a string of numbers that links to an item. Items can have multiple barcodes assigned to them. Some barcodes called Price Embedded Barcodes encode information such as the quantity, weight or price of the item into the barcode. You can configure different types of price embedded barcodes in the Portal.

## Batch (kit manufacture)

When manufacturing kits, a batch identifies a single point in time where a specified number of kits were manufactured together.

## Batch (stock take)

When performing a continuous stock take, a batch identifies a collection of items scanned at one time by one or more PDTs.

## **Brand**

A brand is a means of identifying items that belong to the same product line. Items can only have one brand, but items from different suppliers may have the same brand.

## **Bonus loyalty points**

Bonus loyalty points are additional loyalty points accrued for certain activities, such as purchasing particular items, or participating in a promotion. Bonus points are accrued in addition to regular loyalty points.

## **Bulk discount**

A bulk discount is a discount on the purchase price that is offered when a certain number of units or weight of an item is purchased in a single transaction. An item can have different discount amounts depending on the number or amount purchased.

## **Company**

A company represents your organisation within the Portal. A company can have one or more sites, representing physical locations of stores, including online stores. Some Portal configurations and features affect the entire company, other configurations can be specified per site.

## **Complete Order**

A customer order is complete when:

- The order has been fulfilled on the Portal.
- The order has been marked as paid in full on the Portal or the customer has paid the remaining amount on the Point of Sale.
- The order has been collected or delivered.

## **Contract**

A contract is a set of rules dictating the price, quantity and incentives offered by a supplier for a specific item, used by the Portal when calculating the best supplier to purchase a particular quantity of that item. Each contract relates to a single supplier and item, and you can have multiple contracts for each supplier and each item.

## **Controlled purchase order / Controlled requisition**

A controlled purchase order or requisition cannot be finalised until it has been authorised by Head Office.

## **Cost matrix / price matrix**

A cost matrix or price matrix is a means by which the Portal can automatically calculate the price of an item at each price level based on the item's supplier cost. You can create multiple cost levels, so that the price levels of an item that cost \$5 might be calculated very differently from an item that cost \$10.

A price matrix can be:

- Department-based, where all items within a department follow the same cost level rules.
- Supplier-based, where all items from the same supplier follow the same cost level rules.

Only one method can be used. You can also elect to use neither.

### **Credit adjustment**

A credit adjustment adds credit to a balance, decreasing the amount of money owed. For example, if you owed a creditor \$100, a \$10 credit adjustment would mean you owed \$90. Credit adjustments are usually used to correct errors. If you need to decrease money owed due to a refund or return, you should use a credit note instead.

### **Credit limit**

A credit limit is the maximum amount of money a debtor is allowed to owe your organisation at any one time. For example, if a debtor's credit limit is \$1000 and they already owe \$900, they can only go into debt to the value of another \$100.

### **Credit note**

A credit note adds credit to a balance, decreasing the amount of money owed. It is usually created when a balance needs to be adjusted due to a return, refund or rebate.

### **Creditor**

A creditor is an entity to whom your company owes money. They may be a supplier, providing the items your company sells, or they may provide another service, such as a cleaner. The Portal treats suppliers and creditors the same. They have a balance tracking how much you owe them, and a credit limit that determines how much your company is allowed to owe them at a time.

### **Creditor contract**

A creditor contract is an agreement between your company and a creditor or supplier to supply a set quantity of an item at a set price for a set period of time.

### **Creditor payment**

A creditor payment is a Portal record of paying invoices or debit adjustments. More than one invoice or debit adjustment may be paid either partially or in full in a single payment record. Creditor payments are a Portal record only and are not connected to your bank account.

### **Cross-reference**

A cross-reference records the supplier's internal item code for an item to streamline the ordering process. Cross-references can make stock receipting easier, if suppliers use their internal codes on delivery dockets. Cross-references are also required to use the Portal Data Interchange (PDI) feature.

## **Colour**

A colour is one of the three item variation options under Fashion. An item with a designated style may have a colour defined, as well as a size. The terms colour size and style may be renamed for your Portal configuration.

## **Customer**

A customer on the iZen Point of Sale is a person or organisation who purchases items in advance, to be collected or delivered at a later date. Customers may also have debtor accounts, where they are allowed to owe money to your organisation and can pay off that debt via the Point of Sale.

A customer on the Portal is a person who has interacted with your company in some way: they may have signed up for a loyalty member, ordered items from your company, opened a debtor account, requested a quote or has some other kind of interaction that created a customer account with their details in the Portal system. A customer may also be a loyalty member, marketing member or a debtor.

## **Debtor**

A debtor is a customer who has been extended a line of credit by your organisation: they are allowed to owe a certain amount of money (up to their credit limit) to your organisation with the agreement the amount is paid off before a set period of time, which allows them to buy large quantities of goods, or buy items frequently and make payments at a later time. Customer orders that have not yet been collected or completed are not counted as "money owed". Customer accounts are separate from debtor accounts, and not all customers are debtors.

## **Debtor balance**

A debtor balance is the amount a debtor currently owes your organisation. This amount only includes finalised transactions that have been added to the debtor's account for future payment, and does not include orders that have not been completed or collected yet.

## **Debtor contract**

A debtor contract is an agreement between your company and a debtor, where they can purchase a set quantity of an item at a set price for a set period of time.

## **Debit adjustment**

A debit adjustment debits a balance, increasing the amount of money owed. For example, if you owed a creditor \$100, a \$10 debit adjustment would mean you owed \$110. Debit adjustments are usually only used for corrections. If you need to record a charge due to an order of goods or services, you should use an invoice.

## **Delivery docket**

A delivery docket is a type of stock receipt that records the incoming stock without creating a creditor invoice. Delivery dockets cannot record delivery fees or discounts. You can match delivery docket stock receipts to creditor invoices.

## Department

A department is a means of categorising items in your inventory. Items can belong to only one department. Depending on your Portal configuration, you may have up to five levels of departments in a hierarchy, by default called Departments, Sub Departments, Categories, Sub Categories and Ranges.

**Note:** This documentation uses the Portal default names for these levels: Department and Division. Your Portal may be configured to use different names, but the function is the same. You can see the names and levels your Portal uses in the Department Layers tab of Company Maintenance.

## Department cost level

A department cost level is a rule used by the Portal to automatically calculate prices for items within a certain cost bracket, according to how much they cost. For example, items below \$5 might be priced at 2 x cost. Items between \$5 and \$10 might be priced at 1.8 x cost.

## Department promotion

A department promotion is a promotion that applies to all items within a specific department. A department promotion allows you to provide a discount for the items purchased, either immediately or as a credit voucher. The promotion can be restricted to only provide a discount if a minimum number of items or minimum sale amount is reached.

## Discount

A discount is a reduction in the price of an item. Discounts can apply to:

- A selected item, calculated either per-unit or per-line.
- The whole transaction, calculated per-unit or per-line for every item in the transaction.

**Note:** Some items may have discount maximums. If the discount you select is greater than the maximum discount allowed for the item, the item is only discounted up to its maximum level.

Per-unit discounts can:

- Reduce an item's price by a percentage of the original price. For example, 10% off.
- Reduce an item's price by a flat amount. For example, \$1 off.
- Set the per-unit price to a set amount. For example, \$5 per item.
- Set the price of the item to its cost price plus a set amount.
- Remove the tax of an item.

Per-line discounts can:

- Cap the total price for an item line to a predetermined amount. For example, the line total may be anything up to a maximum of \$10.
- Set the total price for an item line to a predetermined amount. For example, the line total is \$10.

A discount may also prompt the operator for a discount amount.

**Note:** The item and transaction discounts available and the item discount maximums are configured in the Portal.

**Note:** Special discounts such as some senior citizens' or disability discounts make an item tax exempt. If a tax exempt discount is applied, the customer must supply their Senior Citizen or Tax Exempt ID during the tender process in order to receive the discount. The Point of Sale displays the discount as if from the normal tax-inclusive price.

## Division

Divisions are top-level classifications for departments in your company. The Portal offers two kinds of divisions to support the Oracle financial interfaces: Reporting and Financial. Each department belongs to a single reporting division and a single financial division.

## DSD

A DSD is an external supplier that is not part of your company. You may configure different rules and restrictions for direct suppliers than are used for the company warehouse. You can also restrict sites to use only warehouse suppliers and prevent them from ordering from direct suppliers.

## Employee

An employee is a member of your company staff that you want to roster on to your staff schedule. Employees may or may not have access to Portal and Point of Sale systems, depending on their privileges and account status.

## Fashion

Fashion is the Portal feature that allows you to create variation of items, such as different colours, sizes and styles of the same item. The default labels of colour, size and style can be changed to something that suits your inventory.

## Family card

A family card is a loyalty card that is linked to the loyalty cards of other customers who are immediate family members. Family cards may share loyalty points.

**Fixture**

A fixture is a physical structure or defined area within your site that contains stock. This may include gondolas, counters, refrigerators, back-room receipt trolleys, tables, wall sections or any other area that regularly contains stock on your site. Fixtures are used primarily during stock take.

**Frequent shopper item**

A frequent shopping item is an item that gives loyalty members additional loyalty rewards for purchasing it.

**Gambling machine**

A gambling machine is a single, specific machine at a gambling venue, such as a slot machine.

**Gambling session**

A gambling session is a period of continuous gambling.

**Gambling spin**

A gambling spin is a single instance of betting, for example betting on one round of a slot machine.

**Gambling venue**

A gambling venue is a place that provides gambling machines for customers to use. A venue may have multiple gambling machines.

**Global price change**

A global price change is an instruction to change the price of an item in the future, either at a single site, or across several sites at the same time.

**Group promotion**

A group promotion is a promotion that applies to all items within a group that you define. A group promotion allows you to provide a free item or a discount for the items purchased, either immediately or as a credit voucher. The promotion can be restricted to only provide a discount if a minimum number of items or minimum sale amount is reached.

**Group purchase order**

A group purchase order is a purchase order that combines the requisitions from several sites into one purchase order. Stock levels can be allocated to each site during the creation of the order.

**GSA card**

A GSA (Gambler's Subtle Assist) card is a card that anonymously identifies a gambling customer to the Portal, and helps prevent problem gambling by allowing a customer to set limits to their gambling time, periods and amounts.

### Home delivery

Home delivery is a feature that allows customers to order their items online, over a phone or by mail, and have them delivered to their house.

### Interest rate

An interest rate dictates the amount of interest that is charged on overdue debts by your company.

### Inventory

The inventory is the Portal feature of maintaining all items that you offer for sale in your company.

### Invoice

An invoice details an amount owed by an entity such as your company or a debtor, and the goods or services that incurred that cost. An invoice usually details the period of time by which it must be paid.

You can also receipt stock using an invoice. An invoice stock receipt automatically creates an invoice for that creditor in your Portal records, and allows you to record additional information such as delivery fees and discounts.

### Inter-branch transfers (IBT)

An inter-branch transfer is a transfer of stock from one site within a company to another.

### Item

An item represents a good or service provided by your organisation. Items are added to transactions in order to sell or return them. An item will include information about its:

- Barcode.

**Note:** An item can have more than one barcode.

- Description.
- Unit of measurement, for example an item may be sold by weight or as individual units.
- Price per unit of measurement.

Items also have additional information stored on the Portal, such as stock on hand, promotions and discount maximums.

### Item group

An item group is a group of items created for reporting purposes. For example, items that are frequently sold in an impulse purchase fixture. Items can belong to multiple groups.



### Item label

An item label is a label with price and barcode information for that item. It is usually attached to each unit of the item, whereas a shelf label provides a single label to describe all units of that item on the shelf.

### Item options

Items can be modified with options to detail the customer's specific request. For example, a coffee order may contain soy milk or extra sugar. The options available for each item must be configured in the Portal.

### Item type

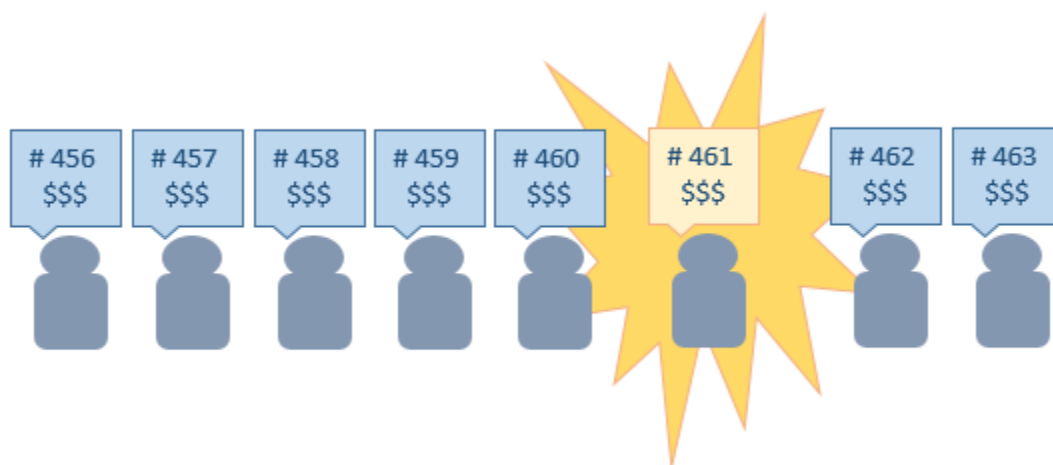
An item type is a way of categorising items for reporting purposes. Items can have only one type.

### Item variation

An item variation is an item that uses Fashion variations of colour, size and style. The default labels of colour, size and style may be renamed for your Portal configuration.

### Jackpot

A jackpot is a prize of loyalty points that accrue over a period from eligible transactions that are awarded to a randomly-selected transaction.



### Journal

A journal is a unique code identifying a date, site and terminal for a transaction within the Portal.

### Kit

A kit is an item that is made up of several other items in your inventory. The kit item itself does not have a stock-on-hand. Instead, when a kit item is sold, the stock-on-hand of the component items is decreased accordingly.

## Label

A label is attached to an item or a nearby fixture and displays information about that item, such as the item's price, best before date and quantity, cooking or nutritional information, or a barcode. Labels can be printed via the Point of Sale.

## Layby

A layby is a transaction where a customer commits to purchase a selection of items at a future date. The customer must pay the full balance by the due date or forfeit the items. The site commits to set the items aside for the customer, so they can be collected when the layby is paid in full. Depending on the company policy, laybys may incur additional setup fees, or require the customer to pay a minimum deposit when opening the layby.

Laybys can only be created and paid for through the Point of Sale, and can only be edited or cancelled on the Portal. Layby collection is not recorded.

## Loyalty

Loyalty is a system to encourage customers to return to your organisation. For example, by:

- Offering discounts on purchases.
- Offering exclusive promotions.
- Allocating points for each purchase that can be redeemed on future purchases.

Loyalty is configured for your organisation on the Portal.

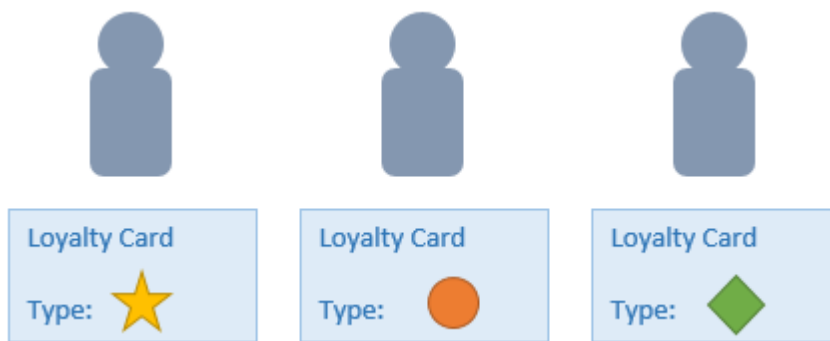
## Loyalty card

A loyalty card is a physical or electronic card that uniquely identifies a customer's loyalty account, and records:

- Contact information.
- Whether the customer wants to be notified of promotions, and which contact method to use.
- The customer's purchases on that card.
- The points balance, if your loyalty is configured to award points.

## Loyalty card type

A loyalty card type defines the rules of the loyalty card, such as how they accrue loyalty points, how points can be redeemed, and whether cards can be upgraded or downgraded to other types.

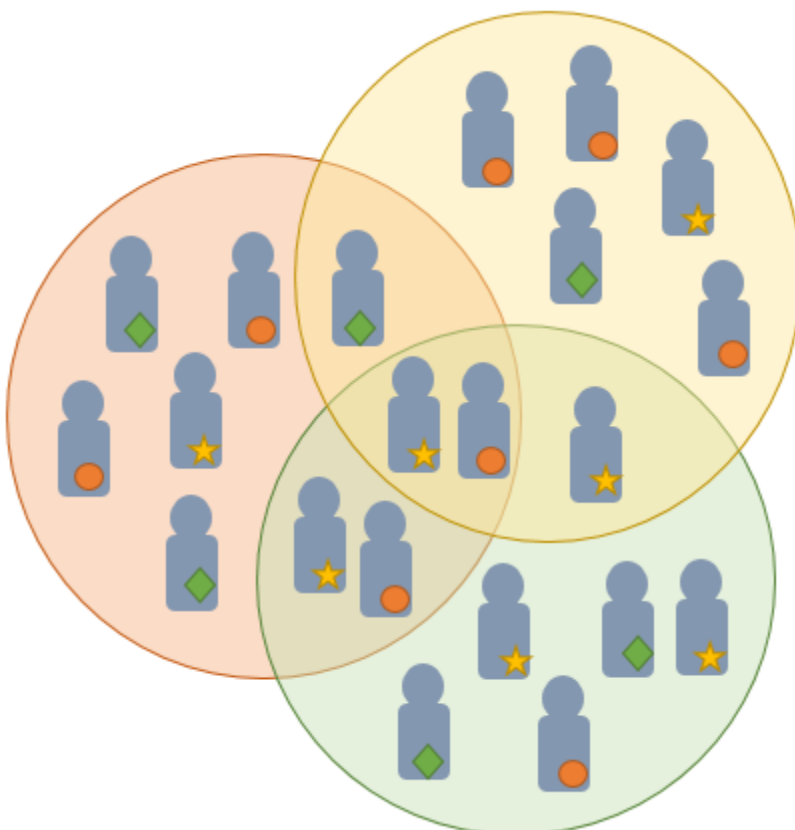


### Loyalty department

A loyalty department allows you to control how a department's items accrue loyalty points for customers who purchase them, and how points are redeemed on items in that department.

### Loyalty group

A loyalty group is a tool for categorising loyalty members to provide jackpots or rewards, or for reporting purposes. Loyalty members can belong to more than one group, and loyalty groups can contain loyalty members with different card types.



### **Loyalty points**

Loyalty points are accrued by loyalty members for purchasing your company's goods or services. The number of loyalty points a loyalty member receives from a purchase is controlled by the item, the loyalty card, loyalty departments and other settings. Loyalty points can be redeemed to purchase goods, or exchanged for vouchers.

### **Loyalty voucher**

A loyalty voucher is a voucher that can be used to purchase goods or services at your company. It is created by redeeming loyalty points for a specific value.

### **Ledger**

A ledger is a financial category or general ledger grouping that a transaction corresponds to for accounting purposes. For example, Expenses, Staff Salary, etc. The Portal uses a ledger for the Trail Balance Profit report. Your Portal may be configured not to use other ledgers.

### **Ledger type**

A ledger type is a category or grouping of ledgers for accounting and reporting purposes, such as Income or Expenses. Your Portal may be configured not to use ledgers.

### **Line minimum**

A line minimum is the minimum number of different items that must be in a transaction to trigger an effect, such as a promotion. Each unique item in a transaction creates its own line. Multiple units of the same item are recorded on the same line. A line minimum of 3 requires 3 unique items to be purchased.

### **Mail out**

A mail out is a communication sent to your customers via email, SMS or postal mail, with marketing, survey, promotion or other information attached.

### **Manufactured Kit**

A manufactured kit is an item that is made up of several other items in your inventory. The kit item must be manufactured on site before it can be sold, and the stock-on-hand of the kit item is tracked by the Portal. When you manufacture a kit, the stock-on-hand of the component items is decreased and the stock-on-hand of the kit item is increased accordingly.

### **Marketing member**

A marketing member is a customer who has joined your marketing program to receive marketing information. They may or may not be a loyalty member or other customer: the marketing list is maintained separately from the loyalty and customer lists.

## Matching

Matching is the process of linking a delivery docket receipt with a creditor invoice you have created in the Portal. Invoice-type stock receipts automatically create a creditor invoice and do not need to be matched.

## Menu area

A menu area is a category of items designed to group items into meal types during table service. For example, coffees, mains, desserts. Menu areas control which modifier items can be applied to which prime items.

## Modifier item

A modifier item is an item in your inventory that is used to add a modification to another item, such as adding 'soy milk' to a coffee. While modifier items can have costs and add to the price of the item they are modifying, they cannot be sold directly on the Point of Sale.

## Offer

An offer is a type of promotion that requires a coupon or code to be presented, and can be configured with a limit on the number redemptions allowed during a certain period. For example, instead of allowing 50% off to every customer, 50% off is only given to the customers who present the offer coupon, or only the first fifty customers who present the offer coupon each day.

## Open transaction

An open transaction is a transaction that has not yet been finalised. For example, a creditor invoice that has not been paid.

## Operator

An operator is a staff member who uses the Point of Sale to process transactions or manage the cash drawer. Each operator is identified by a unique operator code and password that they use to log into the Point of Sale. Operator codes are unique to each site, but do not have to be unique within a company.

## Pack

A pack represents the number of units that an item is supplied in. For example, you may sell cans of soft drink individually, but they are ordered in packs of 24 from the supplier. This is different to a referral, where both the single can and the pack of cans are tracked in the inventory.

## Pallet

A pallet is a set of cartons containing items that are grouped together as a specific collection so they can be tracked from supplier through to sale via barcodes. A pallet usually has a special barcode that encodes the number of cartons it contains, while each carton has a special barcode detailing the quantity of items it contains and their expiry dates.

Pallet barcodes may also be linked electronically to the carton barcodes.

### **Payment terms**

Payment terms is the number of days after issuing an invoice that a creditor expects to be paid. Common payment terms are 21, 30, 60 or 90.

### **PDT**

A PDT, or portable data terminal, is a small hand-held device with a touchscreen and an in-built scanner that can interact with the Portal to sell, order or count stock via the PDT software interface. PDTs are registered as terminals for a site, just as full Point of Sale terminals are, and require operators to log in to use them.

### **PLU group**

A Price Look Up (PLU) group is a way of categorising items for reporting.

### **PLU Loyalty group**

A loyalty Price Look Up (PLU) group provides special loyalty rewards to loyalty members when they purchase items in this PLU group.

### **Portal Data Interchange (PDI)**

The Portal Data Interchange (PDI) is a Portal feature that allows two separate companies that both use the AMC Convergent IT Portal to streamline their procurement process by automating the creation of customer orders and stock receipts between the companies.

### **Permission**

A permission is a configuration that determines whether an operator is allowed to perform a specific task. For example, the ability to authorise purchase orders or change employee records may be restricted to certain individuals.

### **Portal operator**

A Portal operator is someone with login credentials to your company's Portal. What a Portal operator can do depends on their permissions. A Portal operator cannot use their Portal login to log into the Point of Sale.

### **Point of Sale operator**

A Point of Sale operator is someone with login credentials to your site's Point of Sale and PDTs. Depending on their permissions, they may have limited access to some Portal functionality through a PDT, but they cannot use their Point of Sale login to log into the Portal.

### Point of Sale supervisor

A Point of Sale supervisor is a Point of Sale operator with some additional permissions to do things like authorise changes to the Point of Sale terminal, authorise gift voucher returns, or anything else that your Point of Sale configuration requires a supervisor's authorisation for. Their supervisor status is separate from any Portal permissions they may have. Depending on their permissions, they may have limited access to some Portal functionality through a PDT, but they cannot use their Point of Sale login to log into the Portal.

### Point of Sale Transaction

A Point of Sale transaction is an exchange of items, which represent goods or services provided by your organisation, for payment. Transactions include all the relevant information about the exchange, such as:

- The date, time, site and location of the transaction.
- The operator who performed the transaction, and which terminal they used.
- The items purchased or returned and in what quantities.
- The amounts and types of payments provided, including any change or reimbursement provided to the customer or redeemed loyalty points.

**Note:** Transactions cannot be finalised until they balance. That is, the amount owed by the customer is zero, and any amount that has been overtendered has been issued as change.

- The loyalty number linked to the transaction, if applicable.

You can view what is currently included in the transaction in the Transaction list of the Point of Sale.

**Note:** In the Portal, a transaction also refers to an exchange of money, such as the payment of a creditor, or a debit adjustment.

### Price change

A price change updates the Portal with new prices for each price level of an item. Price changes can only be performed by operators with sufficient Portal privileges.

### Price level

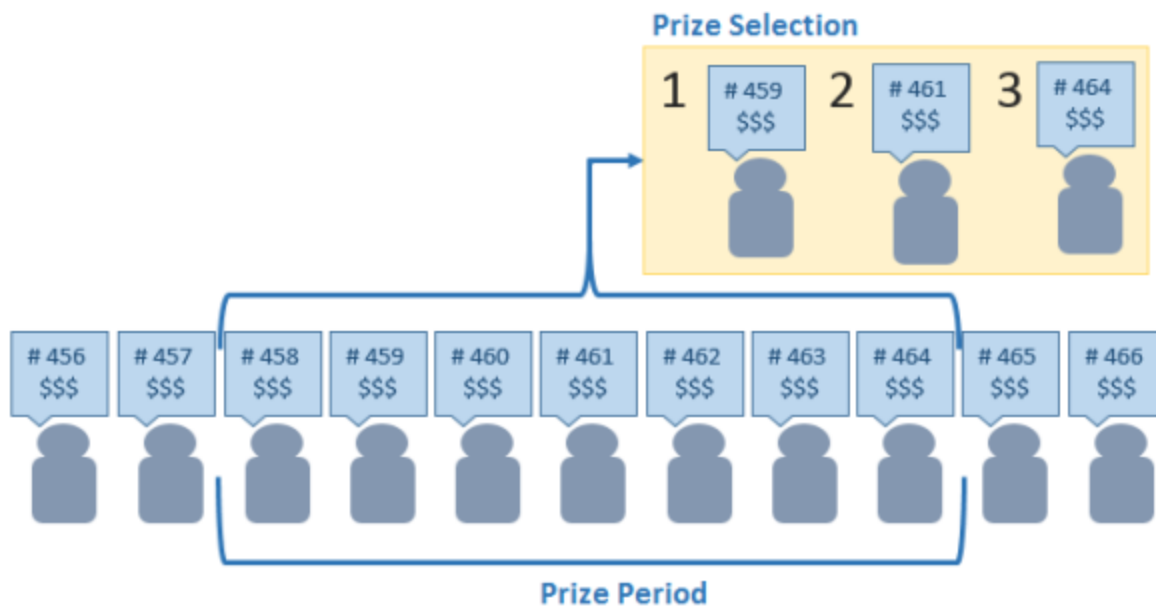
The Portal inventory system can store multiple price levels. For example, you may have one price level for retail customers and another for corporate or wholesale customers. The Point of Sale can be configured to use the appropriate price level when a debtor or customer is added to the transaction.

### Prime item

A prime item is an item that can be sold normally through your Point of Sale. Most of the items in your inventory are likely to be prime items.

## Prize

A prize is an award of loyalty points to one or more random transactions selected from all transactions in a specified period. For example, a prize may be awarded to three transactions every day.



## Procurement

The procurement system is the set of Portal features that manage and maintain the act of replenishing your stock levels, including managing creditors, contracts, requisitions, purchase orders, stock receipts, returns, adjustments and stock take.

## Promotion

A promotion is a Portal feature which lets you create sophisticated rules to offer discounts, free items or rebates when the customer purchases a particular set of or combination of items. The Portal allows you to create promotions based on departments, suppliers, or your own custom item groups.

## Promotion group

A promotion group is a group of items you define that either is used to trigger a promotion, or has the effects of the promotion applied to it. You can use the same group for multiple promotions.

## Purchase order

A purchase order is a request to an individual supplier to purchase a set quantity of specific items. Purchase orders can be created manually, automatically created from finalised requisitions, or generated using procurement configurations.



## Quote

A quote is an offer for your company to provide a specified good or service to a potential customer for a specified price. A quote is usually only valid for a set period, after which it expires.

## Rebate

A rebate is an amount of money offered back to the customer by a supplier as an incentive to purchase. As opposed to a discount, special or promotion, where your company covers the lost profit from the price reduction, the supplier is responsible for reimbursing your company.

## Rebate group

A rebate group is a collection of rebate item groups, used to easily control start and end dates of rebates.

## Rebate item group

A rebate item group is a collection of rebate items, where each item has its rebate rules defined.

## Receipt

A receipt is the printed record of a transaction, including the items, quantities and prices, any loyalty information, the tenders submitted and the operator, the terminal and date the transaction took place at.

## Referral

A referral is a connection between two items in your inventory, where one is considered part of the other. For example, if your inventory tracks both individual cans of soft drink and crates of 24 cans, you can use a referral so that purchasing a single can (Selling item) depletes your stock of crates (Stock item) by 1/24th. This is different to using packs, as both individual cans and whole crates of items are tracked in your inventory.

## Referred item

A referred item is an item that is depleted by the sale of another item. For example, if your inventory tracks both individual cans of soft drink and crates of 24 cans and sells the cans individually, the referred item is the crate of cans, which is depleted every time an individual can is sold. Referred items are also called Stock items in this documentation.

## Requisition

A requisition is a list of items requested by a particular site. Each item is given a requested supplier, and all items are included in a single requisition, even if they are from different suppliers. Finalising a requisition can automatically open a purchase order for the appropriate suppliers. Requisitions from multiple sites may be combined into a group purchase order for a supplier, if your Portal is configured to permit group purchase orders.

## Roster

A roster is a schedule of when specific staff members are supposed to work.

## Sale minimum

A sale minimum is a minimum transaction amount used to trigger a promotion or other effect. For example, a sale minimum of \$10 requires that at least \$10 of items are purchased in a single transaction.

## Scale label

A scale label is an item label for a packaged item sold by weight. It includes the item's weight and the price encoded into the barcode, so the packaged item can be scanned at the Point of Sale without having to be re-weighed.

## Selling item

A selling item is an item that uses a referral to track its stock levels on a different item. For example, if your inventory contains both individual cans of soft drink and crates of 24-cans, and your company sells the individual cans but tracks stock of the crates of 24 cans, then the individual can is the selling item.

## Size

A size is one of the three item variation options under Fashion. An item with a designated style may have a colour defined, as well as a size. The terms colour size and style may be renamed for your Portal configuration.

**Note:** This should not be confused with an item's size as defined in the Details tab of Inventory Maintenance, which details how units of an item should be measured and sold.

## Shelf label

A shelf label is an item label designed to site on a shelf denoting the price and other information for the item, rather than attaching a label to each unit of the item.

## Snap count

A snap count is a record of the stock-on-hand of an item or set of items at the time of the snap count, as tracked by the Portal. Snap counts are used for calculations and reporting.

## Special

A special is a temporary reduced price given to a specific item for a period of time. Where a promotion applies to a group of items, a special applies only to an individual item.

## Statement

A statement is a record of a debtor or customer's balance, for which an invoice has already been issued.

**Stock adjustment / write-off**

A stock adjustment is a record of increasing or decreasing an item's stock-on-hand, with a reason. For example, stock was found after stock take, or stock has been damaged.

**Stock item**

A stock item is an item that is referred to by another item, to track the stock-on-hand. For example, if your inventory contains both individual cans of soft drink and crates of 24-cans, and your company sells the individual cans but tracks stock of the crates of 24 cans, then the crate of 24 cans is the stock item.

**Stock on hand**

Stock on hand is the number of units of a particular item a site currently has. It is updated automatically by stock receipting, transfers, adjustments and sales, and compared against stock take numbers to determine shrinkage.

**Stock receipt**

A stock receipt is the process of recording stock incoming from a supplier to a site. Stock receipts record the supplier, date, item and quantities, including any items that were received but not ordered, or items that were listed but not delivered. Stock receipts may use a delivery docket, which is a plain record of incoming stock, or an invoice, which creates a corresponding creditor invoice in the Portal to link with the stock receipt.

**Stock return**

A stock return is the process of returning stock to a supplier because it is faulty or otherwise unsuitable for sale. Stock returns record the date, item and quantity being returned and the reason for each item being returned.

**Stock take**

A stock take is the process of counting all units of stock at a particular site to obtain an accurate stock-on-hand level. Stock takes can either be continuous, where stock is counted while the site is still open for trading, or manual, where all stock is counted in a single session while the site is closed for trading.

**Style**

A style is one of the three item variation options under Fashion. An item with a designated style may have a colour defined, as well as a size. The terms colour size and style may be renamed for your Portal configuration.

**Supplier**

A supplier is a creditor from whom you purchase items in your inventory.

### **Supplier promotion**

A supplier promotion is a promotion that applies to all items marked as purchased from a specific supplier. A supplier promotion allows you to provide a discount or supplier rebate for the items purchased, either immediately or as a credit voucher. The promotion can be restricted to only provide a discount if a minimum number of items or minimum sale amount is reached.

### **Survey**

A survey is a series of questions posed to customers through marketing mail outs. You can use surveys to create filters for other mailouts or surveys.

### **Table booking**

A table booking is a customer request to be served at a particular table at a specified time, with a specified number of guests.

### **Table section**

A table section is a category of tables, used to differentiate areas of your restaurant on the PDT, and for reporting purposes.

### **Table service**

Table service is the act of serving food or beverages to your customers, either as a take-away service or dine-in service.

### **Terminal (iZen Point of Sale)**

A terminal is the tablet or other device that runs the Point of Sale. Each terminal is connected to the site via the base station, and is identified by a unique terminal number, which is recorded in every transaction made by the terminal.

### **Tipping**

Tipping is a means of engaging your customers by awarding points if they correctly predict which team will win in a series of games.

### **Tipping game**

A tipping game is a single game played between two teams at a tipping venue during a tipping round.

### **Tipping group**

A tipping group is an organisation or sport that supports tipping, such as Australian Rules Football (AFL).

### **Tipping kiosk**

A tipping kiosk is the terminal where tipping members select their game tips.

## Tipping round

A tipping round is a group of games that occur over the same period, such as all the games in a single weekend. Tipping rounds are defined by the organisation body that manages the sport.

## Tipping team

A tipping team is a player or group of players that perform as a single unit, such as a football team.

## Team venue

A tipping venue is a venue or area that a game is played at, such as a stadium.

## Transaction line (iZen Point of Sale)

A transaction line is an entry in the Transaction list that contains an item and its quantity. If more than one unit of an item is added to a transaction, the units are grouped into a single line. Actions such as price overrides, voids, discounts or refunds then apply to all units in the line.

A transaction line is an entry in the Transaction list that contains an item and its quantity. If more than one unit of an item is added to a transaction, the units are grouped into a single line. Actions such as price overrides, voids, discounts or refunds then apply to all units in the line.

Rewards card <span style="float: right;">(i)</span>	
Brian Smith	
Ch & Veg Stirfry 3.992kg N x \$7.99/kg	<b>\$31.90</b>
Gift Voucher recharge	<b>\$50.00</b>
Banana Muffin	<b>-\$2.57</b>
Coffee, Latte	<b>\$3.42</b>
Extra sugar	
Skinny Milk	
Rewards card discount	<b>-\$3.27</b>
<b>Total:</b>	<b>\$79.48</b>
Cash	<b>\$50.00</b>
Credit Card	<b>\$34.10</b>
Rounding	<b>\$0.02</b>
Change	<b>\$4.60</b>

## User account

A user account is an account that allows a Portal or Point of Sale operator to log in and access features of the Portal or Point of Sale.

## **Voucher**

A voucher is a card or ticket preloaded with an amount that can be used to pay for purchases or services. Vouchers may or may not be rechargeable, redeemable or require a fee or deposit, depending on the rules detailed in the voucher type.

### **Voucher mask**

A voucher mask defines the pattern that a voucher code must fit to be accepted as that voucher type. You can define the initial digits of the code, and the acceptable length. For example, you can define that gift vouchers must start with 213 and be 13 digits long. Any gift voucher that does not match this pattern is then rejected by the Portal.

### **Voucher type**

A voucher type is a set of rules that control how a voucher operates within your company, including the voucher mask, whether the voucher can be recharged, or requires a deposit amount. Voucher types can have sub-types that follow the same rules, but are differentiated for reporting reasons.

## **Warehouse**

A warehouse is a supplier that represents your company's central warehouse, used when sites order some or all of their inventory from Head Office rather than directly from external suppliers. You may configure different rules and restrictions for warehouse suppliers than are used for direct suppliers. You can also restrict sites to use only warehouse suppliers and prevent them from ordering from direct suppliers.