

Spotlight - Contact Classifications

Preparation

1. Download latest version and import UK Sample data. Log in with User: sample@hansaworld.com, Password: Sample99
2. PO>> Registers> Items. Find 10101: rename it to iPad Air, change the Base Price to 149.00. (this is to ensure the item has some sales history.)
3. CRM>> Registers>> Standard Texts>> Create New, Code: IPAD, Comment: Mind blowing offer on iPad Air. Click the 'HTML' checkbox.
Download the attached Promo letter and copy-paste the content, into the body of the Stnd. Text. Save.
4. CRM>> Registers>> Contact Letters>> Create New, fill in Field Customer with *, and Field StdText: IPAD. Save it
5. CRM>> Settings>> Contact Classifications>> Create New: CODE = IPAD, Comment = "iPad Air Summer Promotion"
6. Personal Desktop: Drag CRM>> Reports>> Who has bought / Has not bought to your Personal Desktop
7. Personal Desktop: Drag CRM>> Registers>> Contact Letters to your Personal Desktop
8. Make sure Reporting periods are updated, so the first line covers your current year.

Benefits:

Script

Summer is coming - and it is time to generate more sales - so I will show how Standard ERP can help you do this.

We want to target the customers who haven't bought an iPad Air from us. To identify those customers, I will run the "Who has not bought" report. This will help us to get rid of dead or slow moving stock.

ACTION: Run the report from Personal Desktop. Select the item: iPad Air, also select "who has not bought" function. Run.

So now I have the list of all those customers who have not bought an iPad Air. I can now click on "Add classification", to add a tag to all these customers to send them an email.

ACTION: Click on 'Add Classification' and select "IPAD" to field Add Classification. Run. Back in the report, drill down to customer 002.

We can see that the IPAD classification has been added. As you can see these easy steps of classifying your customers is a great way of targeting certain customers to increase your sales by cross-selling and up-selling.

ACTION: Close the Contact card to go back to the report, then close the report as well to go back to Home.

Now, I want to send an email to all those customers who did not yet buy an iPad Air.

ACTION: Open Contact letters from the Personal desktop and open number 7 (or the one you created in the preparation step)

I just fill in a couple the field to specify the classification,

ACTION: Enter IPAD in field Customer Classification. Go to the Stnd text field and click Cmd-Shift-V (Mac) or Shift+F2 (Windows) to show the IPAD standard text.

And this is the text of the mail that was prepared earlier by Marketing; it can be formatted in HTML for a more powerful presentation.

ACTION: Save the Contact Letter record and from Operations Menu, show the Letter List. Scroll down to the bottom to show how many customers will receive this.

Now you can see the email text and the customer list that will receive this promotion offer. And with 1 more click, I can send it off.

ACTION: Open Operations Menu>>And move cursor over, but don't click, Send Email.

Taking only one minute, we created a targeted marketing campaign for all of these customers.