15

Mercury Marketing

FTD Mercury gives you several marketing options:

» FTD Mercury provides you with standard marketing letters that you can use to market to sending florists, customers, and recipients. See Marketing Letters on page 15–3.

» You can assign marketing categories to your customers so that you can better target them when printing marketing letters. See Marketing Categories on page 15–14 for details.

» The Mercury Marketing upgrade module allows you to create direct mail and email marketing campaigns using professionally designed email templates, as well as Microsoft Word templates formatted for letters or postcards. See Mercury Marketing Module on page 16–1 for details.

This chapter covers marketing options included in the base version of FTD Mercury. If you want to order the Mercury Marketing module, contact Mercury Technology Sales at 1-800-767-3222.

Marketing Ideas

Looking for some marketing ideas? The following list of marketing ideas was compiled by fellow member florists. Try some of these methods to see which ones work best in your area.

» Send direct mail to parents of college freshman who are members of sororities. If you obtain the address list from the college, you can take the data to the post office and the post office will create the mailer and handle the mailing as well. Obtaining the parents' addresses may be a challenge, but the pay off is well worth it. The students will belong to the sorority all four years of college.

» Magnets are a great giveaway. Popular magnet giveaways are either the business card size or ruler size. The business card type can even have coupons attached. Take the business card information, add coupons to the bottom, and attach a magnetic strip to the back side.

» Your neighborhood Welcome Wagon receives approximately 35 to 40 new names monthly. Inquire about advertising options with the Welcome Wagon. For example, you can give new home owners a packet that contains a letter, magnet, and a coupon for 10% off their first purchase. You can also contact your local Chamber of Commerce for similar marketing opportunities.

» Consider offering a VIP frequent purchase card. The frequent purchase card can be used to track purchases, offer a discount or a free item after so many purchases, etc. You can also provide the customer with a sleeve to store the VIP card. The sleeve is a great place to advertise your products and services.

» Work with schools and organizations to help raise money. For example, you can sell a coupon card for free flowers or coupons to use towards a purchase.

» Place a changeable copy sign outside in front of your shop. Place special advertisements on the sign, such as "Receive a free flower for stopping in on your birthday," or "Receive a free flower if your name is ----." Change the sign frequently.

» Send a rolodex card and welcome letter to new customers.

» Work with the Susan G. Komen Foundation as a Valentine's Day promotion. For example, sorority sisters from a local college (or any group of volunteers) can deliver flowers on Valentine's Day and pass out pamphlets regarding breast cancer awareness. You can then donate the $7.00 delivery charge for each delivery to the Komen foundation. Volunteers from a local chapter of the Susan G. Komen foundation may also work in your store and donate funds based on the hours worked.

» Send reminder cards for birthdays, anniversaries, holidays, etc. Most florists find that the returns are great for this type of marketing.

» Send a postcard to customers who have not purchased in a while saying that "we miss you."

» Meet with local funeral directors to discuss products and services that you offer. Provide them with pictures, prices of your work, or the FTD Selection Guide. You can make commission arrangements with the funeral director. For example, if the funeral director refers a customer to the shop, they can receive a commission of 5%. If the funeral director handles the entire order, they can receive a 10% commission.

» Advertise in the local newspaper on the Obituary page.

» When advertising in the newspaper, select an appropriate section for your ad based on your message.

» If your local newspaper is available online, create a link to your Web site through the Obituary page. Newspapers normally charge a monthly fee for this service.

» Partner with a local restaurant. Provide them coupons for a discount or free bouquets that they can pass out to their regular customers as a thank you. Reverse the same courtesy to the restaurant; include with monthly statements a coupon for a free drink, etc. from the restaurant as a thank you. Locally owned restaurants are usually more willing to form this type of partnership (vs.chain restaurants).

» Use column ads or bold listings in the yellow pages. Most florists find that the bold listings are successful. If you use the yellow pages, show product arrangements, prices, etc. Customers already have a need to buy!

» Billboards are relatively inexpensive given the passers by.

NOTE   Be careful if advertising on a billboard for a specific holiday. If your contract is up and the bill board has not been resold, your holiday message may still be there after the holiday.

» Send the recipients of your product a thank you postcard combined with a self survey. They can rate you on your performance, quality, etc. and detach the postcard, which can be sent back to the sender of the flowers as a thank you.

» Pick a charity and be their florist. Most big charities have fund raising events that need flowers. Offer to donate the floral decorations in return for advertising and mentions in programs and all media notices.

» Delivers your "non-saleable" bouquets from your cooler to local hospitals, the Chamber of Commerce, City Hall, etc. with your card on it. If you are concerned that the arrangement is not a true representation of the quality of product from your store, perhaps a card included could indicate the product is past its prime.

» Run a monthly floral drawing where customers must enter to win.

» You can offer discounted flowers delivered to patients in hospitals and nursing homes on a specific holiday. For example for Christmas, you can use poinsettias that are left over from your

or your grower's inventory. You can sell these for a reduced rate, but your customers pay you $5.00 for example to make the delivery. This way you get your customers involved in sending flowers to patients—it's a win-win for all.

Marketing Letters

Using forms provided in FTD Mercury, you can create several different letters for marketing purposes, including thank you letters for florists who have sent you business, discount letters, reminders to customers of upcoming occasions, and even completely custom letters. You can also print matching address labels, making the process of addressing these envelopes quick and efficient. FTD Mercury is designed to print labels using a template for Avery Standard 8160 labels, which can be purchased at most office supply stores.

Marketing Letter Tasks

- » Printing Florist Thank You Letters
- » Printing Order Recipient Discount Letters
- » Printing Mailing Labels
- » Printing Occasion Code Letters
- » Creating Customer Letters
- » Printing Delinquency Letters
- » Modifying Letter Templates

Printing Florist Thank You Letters

FTD Mercury provides you with a way to print thank you letters to florists who have sent you business, as well as the ability to print matching address labels. The mail merge capability makes addressing these letters and envelopes an efficient process.

TASK   **To print thank you letters with matching address labels:**

1   On the **Management** menu, click **Reports and Templates**.
2   Double-click the **Mercury Forms** folder.
3   Double-click the **Letters and Templates** folder.
4   Double-click on the **Florist Thank You** icon to open the template.
5   When the **FTD Mercury - Florist Thank You Letter** window opens, click **Next**.
6   In the **Select Start Date** window, select the month, day of the month, and year you wish to start the extraction. Then, click **Next**.
7   In the **Select End Date** window, select the month, day of the month, and year you wish to end the extraction. Then, click **Next**.
8   When the **Sender Information** window opens:
    a.   In the **Enter the sender's name** field, enter the name of the person who is signing the letters (for example, the store owner).
    b.   In the **Select a Store** field, click the arrow and select the name of the store sending this letter.
    c.   Click **Next**.
9   Review the information you have just entered in the **Finish** window. If you need to change information, you may click the **Back** button to go back to any previous screen(s) and change information. If the information is correct, click **Finish**.

10 When the **Mailing Labels** window opens and prompts you with `Would you like to create mailing labels?`, click **Yes** to create matching labels for letter recipients, or click **No** to print the letters only. If you chose No, skip to step 15 below.

11 When the **Labels** document opens displaying the completed labels, load your Avery 8160 Standard labels and select **File**, **Print**.

12 When the label printing is complete, select **File**, **Close**. When prompted, indicate if you want to save the document.

13 When the **Form Letters** document reappears, load the paper in the printer and select **File**, **Print**.

14 When the letter printing is complete, select **File**, **Close**. When prompted, indicate if you want to save the document.

Florist Thank You Letter

```
October 1, 2005

FTD Flower Store
3113 Woodcreek Drive
Downers Grove, IL 60515


Dear Fellow FTD Florist:


Thank you for your recent floral order.

We at FTD Flower Store appreciate your confidence and trust in us. Like you, we
strive to provide quality service and products to our customers. Rest assured,
orders we receive from fellow FTD Florists are treated with the same care and
attention as our everyday customers here in our shop.

If you should need more floral orders filled in this area sometime in the future, we
hope that you will remember us.

Once again, thanks for your patronage!


Regards,
FTD Flower Store
```

Printing Order Recipient Discount Letters

FTD Mercury enables you to print discount letters to order recipients, including matching address labels. You can choose to print letters for Order Entry recipients (using data from Order Entry) or Mercury order recipients (using data from incoming Mercury orders).

TASK   **To print order recipient discount letters:**

1 On the **Management** menu, click **Reports and Templates**.

2 Double-click the **Mercury Forms** folder.

3 Double-click the **Letters and Templates** folder.

4 Double-click on the **10% Off** icon to open the template. The 10% Discount Letter window opens.

Figure 15-1: **10% Discount Letter Window**

5   In the **Type** area, select whether you want to send discount letters to Mercury order recipients or Sales Order recipients. This selection determines which recipient information to print. If you select Mercury 10% Discount Letter, FTD Mercury prints only incoming Mercury order recipients. If you select **Sales Order 10% Discount Letter**, the system prints only Order Entry recipients (including Mercury orders attached in Order Entry).

6   In the **Sender's Name** field, type the name that you want to appear on the signature line of the letter (such as the employee sending the order, or the store owner).

7   If you have multiple stores, select the sending store in the **Select Store** field.

8   In the **Date Range** area, select the start and end dates for the orders that you want to include in the merge.

9   If you want to exclude orders with the **Sympathy** occasion code, make sure the check box is selected at the bottom of the window. It is highly recommended to keep this box selected so that you do not accidentally print and mail a letter to a sympathy recipient.

10   Click **Finish**.

11   At `Would you like to create mailing labels?`, click **Yes** to create matching labels for letter recipients, or click **No** to print the letters only. If you chose No, skip to step 13 below.

12   When the **Labels** document opens displaying the completed labels, load your Avery 8160 Standard labels and select **File**, **Print**.

13   When the label printing is complete, select **File**, **Close**. When prompted, indicate if you want to save the document.

14   When the **Form Letters** document reappears, load the paper in the printer and on the File menu, click Print.

15   When the letter printing is complete, on the File menu, click Close. When prompted, indicate if you want to save the document.

Recipient Discount Letter

```
Get 10% Off Your

Next Floral Purchase!

(if you save this letter)
```

```
October 1, 2005

John Smith
2131 Yellowstar Lane
Springfield, VA 12345


Dear John Smith,


On 09/06/01 you received a floral order from our shop, The Flower Store. We hope
that you were pleased with your arrangement and enjoyed the special sentiment that
flowers convey.

When you have a special occasion to celebrate or a sentiment you'd like to convey,
we hope that we can be your first choice. The Flower Store is an FTD member, which
means you'll get the highest quality products and speedy service that's recognized
around the world.

As a special offer to recipients from our shop, we'd like to extend a one-time 10%
discount on any order that you place within 90 days.

All you have to do is bring this letter into our shop to receive your special
discount. For phone orders just give us the code number at the bottom of this
letter. Either way, you can save money.

We hope to serve you soon!


Regards
The Flower Store

P.S. Don't throw away the letter! Remember, this offer is good for 90 days.

Phone order code: FTD-A1
```

Printing Mailing Labels

FTD Mercury enables you to print mailing labels for customers and order recipients. It is designed to use Avery Standard 8160 address labels, which can be purchased from most office supply stores.

TASK   **To print mailing labels:**

1   On the **Management** menu, click **Reports and Templates**.
2   Double-click the **Mercury Forms** folder.
3   Double-click the **Letters and Templates** folder.
4   Double-click the **Mailing labels** template. The **Mailing Labels** window opens.

Figure 15-2: Mailing Labels

5   In the **Type** section, select whether you want to print **Mercury Mailing Labels** or **Sales Order Mailing Labels**. **Mercury Mailing Labels** prints labels for recipients of Mercury orders; **Sales Order Mailing Labels** prints labels for customers or recipients that placed orders that were processed through Order Entry (local or wire out orders).

6   In the **Print Customer/Recipient Labels** area, select whether you want to **Print Labels Within Date Range** or **Print All Labels**. If you select **Print Labels Within Date Range**, the **Date Range** section becomes active so that you can enter a date range.

7   If you selected to print **Sales Order Mailing Labels**, then select in the **Select Address Type for Mailing Labels** section if you want to create labels for **Customer Addresses** or **Recipient Addresses**. **Customer Addresses** prints labels for customers who placed orders at your shop. **Recipient Addresses** prints labels for the recipients of orders that were placed at your shop.

8   If you selected the **Print Labels Within Date Range** option, then you must specify a sale date range in the **Date Range** section. Click the down arrows in each of the **Start Date** and **End Date** sections to select start and end dates for the date range.

9   If you want to print customers with particular marketing types, click **Marketing Criteria Selection** so that a check mark appears (otherwise leave this option unchecked). This allows you to filter customer information so that, for example, you can print only Business accounts in the report. (If this area is blank, it means that you have no marketing categories set up. See Marketing Screen on page 24–21 for information on setting up these categories.)

To select marketing categories to print, first click on a category so that a drop-down arrow displays. Click this arrow to display a drop-down list of marketing types. Then check which types you want to print.

To print only customers with no marketing information specified in the **Customer Detail Information** window, first check the **Marketing Criteria Selection** option so that a check mark appears, then check **Customers with No Marketing Criteria**.

10   When you have completed all of the information in this window, click **Finish**.

11   When the **Labels** window appears, load your Avery Standard 8160 labels and on the **File** menu, click **Print** to print your mailing labels.

12   When the label printing is complete, on the **File** menu, click **Close**. When prompted, indicate if you want to save the document.

Printing Occasion Code Letters

NOTE   This report should only be printed if you have at least one of the following upgrade modules: Accounts Receivable, Order Entry, and/or Point of Sale.

Occasion code letters remind your customers of upcoming occasions for which they have previously made a purchase for your shop. These letters remind the customer of the special occasion, and offer product recommendations.

TASK   **To print occasion code letters:**

1   On the **Management** menu, click **Reports and Templates**.

2   Double-click the **Mercury Forms** folder.

3   Double-click the **Letters and Templates** folder.

4   Double-click on the **Occasion Code** icon to open the template.

Figure 15-3: **Occasion Letter Window**

NOTE   Remember that the dates you are selecting in steps 8-9 refer to orders placed a year ago. This way, FTD Mercury can look back and see which customers placed an order during that time period.

5   In the **Sender's Name** field, type the name of the employee (or store owner) that is sending the letter. Then click the arrow in the **Select Store** field and choose the store from which this letter is being sent.

6   Click the arrow in the **Code** field and choose the occasion for which you are creating letters.

7   In the **Date Range** section, select a start and end date for the data that you want to include in the report. Remember that these dates should be for orders that were placed last year.

8   If you want to print customers with particular marketing types, click **Marketing Criteria Selection** so that a check mark appears (otherwise leave this option unchecked). This allows you to filter customer information so that, for example, you can print only Business accounts in the report. (If this area is blank, it means that you have no marketing categories set up. See Marketing Screen on page 24–21 for information on setting up these categories.)

   To select marketing categories to print, first click on a category so that a drop-down arrow displays. Click this arrow to display a drop-down list of marketing types. Then check which types you want to print.

   To print only customers with no marketing information specified in the **Customer Detail Information** window, first check the **Marketing Criteria Selection** option so that a check mark appears, then check **Customers with No Marketing Criteria**.

9   Click **Finish**.

10 At `Would you like to create mailing labels?`, click **Yes** to create matching labels for letter recipients, or click **No** to print the letters only. If you chose **No**, skip to step 11 below.

11 When the **Labels** document opens displaying the completed labels, load your Avery 8160 Standard labels and on the **File** menu, click **Print**.

12 When the label printing is complete, on the **File** menu, click **Close**. When prompted, indicate if you want to save the document.

13 When the **Form Letters** document reappears, you can customize your letters as desired. Type in suggested products and prices.

NOTE   If you want to quickly and easily replace the generic text in the letter with your own text, use the **Replace** command on the **Edit** menu. By doing this you can quickly "find" the generic text (such as the text that reads "[description, price]") and "replace" it with your own custom text (such as "a dozen roses for $50."). Clicking **Replace All** replaces all of the generic text with your custom text.

14 When you are ready to print the letters, load the paper in the printer and on the **File** menu, click **Print**.

15 When the letter printing is complete, on the **File** menu, click **Close**. When prompted, indicate if you want to save the document.

Occasion Code Letter

```
You Have a Special Event Coming Up!


October 1, 2001

John Smith
123 Main Street
Lisle, IL 60532


Dear John Smith:
```

```
Last year you asked us to deliver a floral gift to Jane Smith on November 08, 2000.
Would you like to celebrate this birthday with the memorable gift of flowers once
more?

We have several products and different price levels to choose from. For example, our
most affordable gift is [add detailed descriptions of most affordable product with
price]. For just a few dollars more, you can choose an arrangement with
[description, price]. And for that truly memorable gift, we can deliver an
arrangement that includes [description, price].

Any of these products is sure to bring a smile to the face of someone special with a
special event coming up. Call us today to place your order and ensure timely
delivery of one of these lovely gifts.

Thank you for your business. We look forward to hearing from you soon!


Regards,
The Flower Store

P.S. In addition to the products described above, we'd be happy to customize an
arrangement for you. Give us a call or stop on in!
```

Creating Customer Letters

The Customer Letter template allows you to create a custom letter to send to your customers. The template has been set up to merge your customer information so that each letter will be a professional, customized letter. Then you can create your own text message in the letter and save the template for later.

TASK　　**To create a custom letter:**

1　On the **Management** menu, click **Reports and Templates**.

2　Double-click the **Mercury Forms** folder.

3　Double-click the **Letters and Templates** folder.

4　Double-click on the **Customer Letter** icon to open the template. The following message appears:

```
The customer letter is designed to allow you to create a customized letter to
send to your top customers. You can either edit and save the letter to be used
later or use the letter as it exists now to generate custom letters.
```

At this time you must decide if you want to first generate the letters (merge the customer data) or edit the letter. FTD suggests you first edit the letter. Click **Edit Letter** to edit the letter.

5　Before editing the letter, make sure that you print the instructions that are on the letter. To do this, on the **File** menu, click **Print**. Save these instructions in case you have to refer to them at a later time.

6　Delete the instruction portion of the letter (between the asterisks (***) messages). Do not delete text marked by brackets (<<>>). This text marks where the customer data will be merged. If you edit this text then the data will not merge correctly.

7　Type the body of your letter (where the instructions used to be) in a standard letter format. Remember not to delete text marked by brackets (<<>>).

8　Save the letter when it is complete. To do this, on the **File** menu, click **Save As**.

9　Select a name and location to save the letter (or accept the default name and location) and click **Save**.

10　On the **File** menu, click **Close**. You must close the file so that when you re-open the file, the template wizard will reappear.

11 When you are ready to merge the customer information, open the custom letter file that you just saved.

12 Click **Generate Letters**. The **Custom Letter** window opens.

13 In the **Select Store** field, click the arrow and select a store name. The customers that are in that store's customer database will be printed. To select all stores, click **Select all locations**.

14 You can choose to type a number of top customers (customers with the highest sales volume) in the **Top Customer Option** field. For example, if you would only like to print the top 50 customers, type 50 in this field. You may leave this field blank.

15 In the **Date Range** field, select a sale date range, so that only customers who made purchases within the date range will be printed. To do this, click the down arrows in each of the **Start Date** and **End Date** fields to specify a start and end date for the date range.

16 If you want to specify a range of ZIP codes (for example "60501 to 60512"), type the beginning ZIP code in the **Start** field and the ending ZIP code in the **End** field and then click **Add**. The range is added to the text box below. You can then add more ZIP code ranges. You can also leave this information blank.

NOTE   To enter a specific ZIP code, type a zip code in the **Start** field and then click Add. You can then add additional zip codes this way.

17 If you want to print customers with particular marketing types, click **Marketing Criteria Selection** so that a check mark appears (otherwise leave this option unchecked). This allows you to filter customer information so that, for example, you can print only Business accounts in the report. (If this area is blank, it means that you have no marketing categories set up. See Marketing Screen on page 24–21 for information on setting up these categories.)

To select marketing categories to print, first click on a category so that a drop-down arrow displays. Click this arrow to display a drop-down list of marketing types. Then check which types you want to print.

To print only customers with no marketing information specified in the **Customer Detail Information** window, first check the **Marketing Criteria Selection** option so that a check mark appears, then check **Customers with No Marketing Criteria**.

18 When you are finished selecting the options in this window, click **Finish**.

19 You are then asked Would you like to create mailing labels? Click **Yes** if you want to print mailing labels, otherwise click **No**. You can also see Printing Mailing Labels on page 15–6 if you want to print mailing labels at a later time.

20 To print the letters, on the **File** menu, click **Print**.

Printing Delinquency Letters

NOTE   This report should only be printed if you have the Billing upgrade module.

Sending delinquency letters to customers who need the reminder for payment helps you collect from those customers. FTD Mercury includes a gently-worded letter template to help you send a reminder.

TASK   **To print delinquency letters:**

1 On the **Management** menu, click **Reports and Templates**.

2 Double-click the **Mercury Forms** folder.

3 Double-click the **Letters and Templates** folder.

4 Double-click on the **Delinquent Letter** icon to open the template.

5 When the **FTD Mercury - Delinquent Letter** window opens, click **Next**.

6   When the **Select Days Due** window opens, select the days past due for which you want to create letters. You may choose any combination of the 30, 60, 90, and/or 120 day periods listed. Then, click **Next**.

7   When the **Sender Information** window opens:

   a.   In the **Enter the sender's name** field, enter the name of the employee who is sending this letter.

   b.   Click the arrow in the **Select a Store** field and choose the store from which the letter will be sent.

   c.   Click **Next**.

8   Review the information you have just entered in the **Finish** window. If you need to change any information, you may click the **Back** button to go back to any previous screen(s) and change information. If the information is correct, click **Finish**.

9   At `Would you like to create mailing labels?`, click **Yes** to create matching labels for letter recipients, or click **No** to print the letters only. If you chose No, skip to step 14 below.

10 When the **Labels** document opens displaying the completed labels, load your Avery 8160 Standard labels and select **File**, **Print**.

11 When the label printing is complete, select **File**, **Close**. When prompted, indicate if you want to save the document.

12 When the **Form Letters** document reappears, load the paper in the printer and select **File**, **Print**.

13 When the letter printing is complete, select **File**, **Close**. When prompted, indicate if you want to save the document.

Delinquency Letter

```
October 1, 2001



John Smith
123 Main Street
Lisle, IL 60532



Dear John Smith:


Our records indicate that your account with us is now more than 60 days past due.
According to our records, the total unpaid amount as of the date of this letter is
$64.48. Total past due is $64.48.

We value your business and want to continue to provide you with quality products and
timely service. However, good business practices require us to insist on payment of
your balance due today.

If our records are incorrect, please contact our shop immediately. If you want an
itemized list of the products and services provided to you, we would be more than
happy to provide you with that information.

Your prompt attention to this matter will be greatly appreciated.



Regards,
Leslie's Flowers and Gifts
```

```
P.S. Invoices 90 days past due are sent to a credit collection agency, which may
affect your good credit standing. Please don't delay in sending in your payment
today!
```

Modifying Letter Templates

Marketing letters have been created for you so that you can merge customer information into the letter and have custom letters printed to send to your customers. However, you may want to customize the letters by changing the wording on the letters BEFORE you merge customer information. This way the letter appears exactly as you want, and you will not have to manually change the letters before printing.

You can modify all of the following letters:

» Florist Thank You Letter on page 15–4
» Recipient Discount Letter on page 15–5
» Delinquency Letter on page 15–12
» Occasion Code Letter on page 15–9
» Creating Customer Letters on page 15–10

TASK   **To change a marketing letter template before you merge FTD Mercury data into the letter:**

1   On the **Windows Start** menu, point to **All Programs**, point to **Microsoft Office**, and select **Microsoft Word**. Microsoft Word opens.
2   On the **File** menu, click **Open**. The **Open** window appears.
3   From the **Files of type** list at the bottom of the window, select **Document Templates**.
4   On the left side of the window, click **Desktop**.
5   Click **My Computer**, **Local Disk**, **Wings**, **Office Templates**, **Mercury Forms**.
6   Select the template you want to change and click Open.

NOTE   If you selected to edit the Customer Letter template, a popup window displays asking you if you wish to edit the letter or generate letters. Click Edit Letter.

7   Edit the letter as you wish. Be careful not to change the fields that are marked with brackets (<< >>).
8   When you are finished editing the letter, on the **File** menu, click **Save As**.
9   Type a unique file name in the **File** name text box in the Save As window (for example CustomerLetterMarch2003). Make sure that you type a unique file name. If you do not type a unique file name then you will replace the original file.
10 Click **Save**.
11 Exit out of Microsoft Word. To do this, on the **File** menu, click **Exit**.
12 Open Microsoft Word again. On the **Windows Start** menu, point to **All Programs**, point to **Microsoft Office**, and select **Microsoft Word**. Microsoft Word opens.
13 Click **General Templates** in the **New Workbook** on the right side of the screen (if you do not see the **New Workbook** on the right side of the screen, click the **File** menu then click **New** to display it).
14 Click the **Mercury Forms** tab.
15 Double-click on the name of your new custom letter that you just created.

NOTE   If you are opening a Customer Letter template, a popup window displays asking you if you wish to edit the letter or generate letters. Click Generate Letters.

At this point the wizard appears and you should complete the wizard as you would normally. The data will merge into your new letters. Then save or print the letters as desired.

Marketing Categories

The Marketing screen in Mercury Administration allows you to set up marketing categories for your customers. Marketing categories help you market to your customers more efficiently. For example, you may want to send marketing letters to customers with a birthday in February, or send a list of specials to your business accounts. You can create custom categories that will help you in your marketing efforts.

You have the opportunity to specify certain marketing categories when printing mailing labels, occasion code letters, and all types of customer lists. This way you do not have to print customer information for all customers; you can specify customers that only fall into certain marketing categories.

Marketing categories are set up in Mercury Administration. You assign the categories to your customers in the Marketing tab of the Customer Detail Information window.

TASK   **To set up marketing categories:**

1   Access **Mercury Administration** by using one of the following methods:

    »   If you are already logged into FTD Mercury, on the **Tools** menu, click **Mercury Admin**.

    »   If you are not logged into FTD Mercury, double-click the **Mercury Administration** icon on your computer's desktop. Type your login name and password and then click **Login**.

2   Double-click on the **Accounting** folder on the right hand side of the window.

3   Double-click **Marketing**.

Figure 15-4: Marketing Screen in Mercury Administration
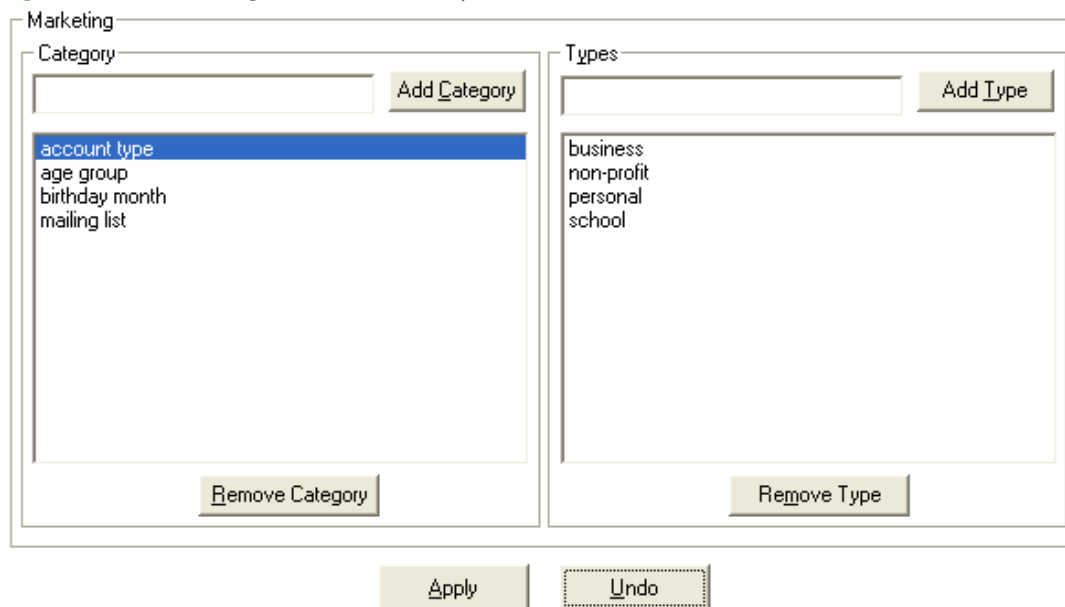
4   Type a category in the text box under the word **Category**. Some examples of categories are account type, birthday month, mailing list, age group, etc. After typing a category in the text box, click **Add Category**.

5   With the category highlighted in the text box on the left, type the first marketing type for that category under the word **Types** (on the right). For example, if the category is "account type," some related marketing types may be Business, Personal, Non-profit, School, and Other. Type the first marketing type and then click **Add Type**. Then type another marketing type for this category and click **Add Type** again, until all marketing types are added to the list.

6   At this point you can add another category in the **Category** field, and add types for that category. Notice that when you highlight a category in the list of categories, the types for that category display on the right in the list of types. Make sure that when adding/removing types, you have the correct **Category** highlighted.

7   When you are finished adding categories/types, click the **Apply** button.

Assigning Marketing Categories to Customers

To see the categories and types that you created, log into FTD Mercury and perform a Customer Search to bring up a customer (on the FTD Mercury Main Menu, in the Search area, click Customer). Once you have located the customer, click the Marketing tab to see the marketing categories:

Figure 15-5: Customer Detail Information Window – Marketing Tab

From this tab you can select category types for the customer.

TASK   **To select a category type in the Marketing tab:**

1   Click in the **Type** column for the category so a menu appears.

2   Select the category.

3   When you are finished selecting categories for the customer, click **Save**.

In the example above, the user is setting the "mailing list" to "yes" for this customer, so that when she wants to send out a mailing, she can create letters and labels for only those customers that want to be on the mailing list.

Using Customer Categories in Reports

Marketing categories are especially useful when printing reports. Some FTD Mercury reports allow you to print customer information by marketing category. For example, if you want to print a customer list of only your Business accounts, you could do so in the Customer Master List report by specifying that you want to print Business accounts in the Marketing Criteria Selection area of the screen (the report window displayed below is for the Customer Master List):

Figure 15-6: Selecting Customer Categories in Reports
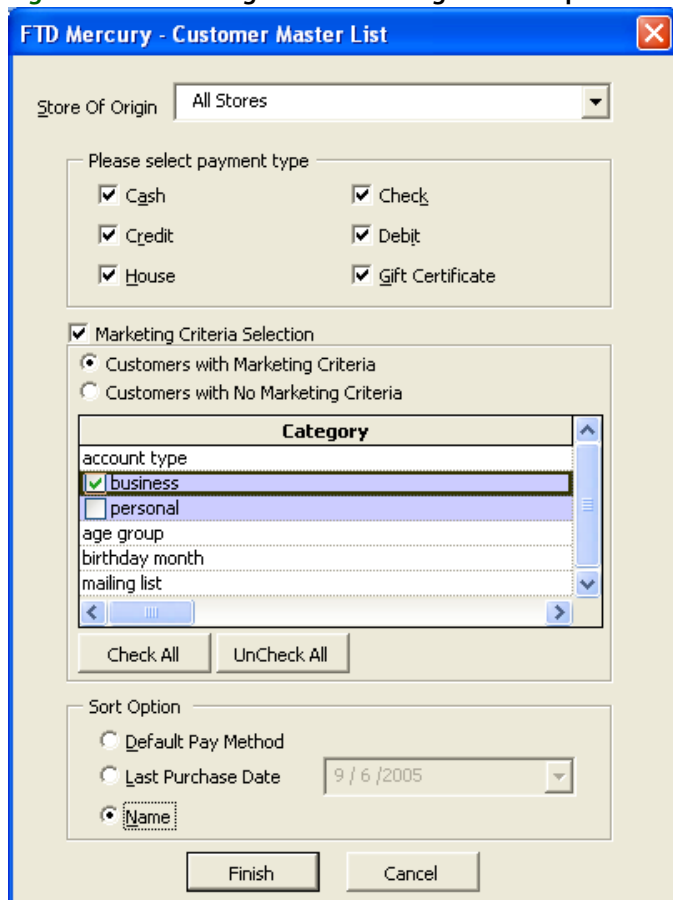
In this example, the florist set up a marketing category of "Account Type" and set up the following account types: Business and Personal. By maintaining the account types, the florist is able to print reports based on account types. In this example only Business accounts are selected to print.

If you would not like to filter customers by marketing information, leave the Marketing Criteria Selection option unchecked. Marketing information will not be considered when printing the report.

To print only customers with no marketing information specified in the **Customer Detail Information** window, first check the **Marketing Criteria Selection** option so that a check mark appears, then check **Customers with No Marketing Criteria**.

The following reports and letters allow you to print by marketing category (to learn how to access the reports and for step-by-step instructions, see Business Reports on page 19–1 and Marketing Letters on page 15–3:

» Customer Master List
» Abbreviated Customer Master List
» Customer Letter
» Occasion Code Letter
» Mailing Labels

The marketing information that you selected for the report prints at the top of the report. The Customer Master List is the only the report that prints each customer's marketing selections.