

# Mercury Marketing Module

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The Mercury Marketing module allows you to send direct mail and email marketing promotions to your customers. With the upgrade to Mercury Marketing, you can create custom marketing campaigns that target a specific set of customers, and use the campaigns to send email messages, letters, or postcards to the customers that you already have saved in your FTD Mercury customer database.

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**IMPORTANT** If you have yet to purchase the Mercury Marketing module, contact Mercury Technology Sales at 1-800-767-3222 to learn more about how it can help your marketing efforts!

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To automate the marketing process, FTD has provided you with dozens of colorful, professionally-designed Microsoft Word templates for all occasions, which can be customized to suit your needs. You can even create your own custom templates. When your campaign is created, your customer information is merged into the templates, and you can print the templates on your own printer, or send them to a printer to be printed.

If you plan to send email promotions, FTD has partnered with Constant Contact®, a company that maintains an email marketing Web site that is exclusive to FTD florists. Email marketing works by first creating your campaign in the Mercury Marketing application, then uploading your customer list to the Constant Contact Web site. On the Web site you select the template you want to use, schedule when you want the email messages to be sent, and then Constant Contact handles the email distribution. Constant Contact keeps all of your customer information confidential, and does not use it for any other purpose than for sending your marketing email messages.

**NOTE** Email marketing distribution is an add-on to the Mercury Marketing module, and is billed separately by Constant Contact. You must begin by registering with Constant Contact at <http://ftd.constantcontact.com>. Constant Contact manages opt in and opt out and adheres to permission-based marketing. Neither Constant Contact or the Mercury Marketing module allows you to send promotions to purchased lists of customers. You may only send promotions to customers that you have a relationship with (customers that are within your database).

## Launching the Mercury Marketing Module

**TASK** To launch the Mercury Marketing module:

- 1 Open FTD Mercury.
- 2 Log in using a login name and password that has permission to use Mercury Marketing.
- 3 On the **FTD Mercury Main Menu**, click **Marketing**. The Mercury Marketing Wizard opens, and you can begin creating a new campaign or analyzing a campaign you have already executed.

# Marketing Campaigns

Marketing campaigns are promotional campaigns used to send marketing materials to a targeted list of customers for a particular occasion or purpose. For example, you can create a Mother's Day letter for top customers, a birthday reminder postcard for all customers, or an Easter email promotion for new customers. By prompting you for specific information, the Mercury Marketing Wizard can help you create custom marketing campaigns using the data from your FTD Mercury customer database. You can then save these campaigns to reuse, edit, analyze, or schedule later.

To make the campaign creation process easy, the Mercury Marketing Wizard provides you with predefined campaigns that, when generated, use the marketing templates that FTD has created for you. Throughout the campaign creation process you can deviate from the defaults, in which case you will be creating your own custom campaign or creating a new marketing template. Below is a list of the predefined campaigns that you can create. Templates are located on your hard drive in the C:\Windows\Office Marketing Templates directory. You may want to browse this directory and open some of the templates to see which ones you might want to use.

**Table 16-1: Predefined Campaigns**

Campaign Type	List	Template	Description	Letter or Postcard	
Holiday	All Customers Customers by ZIP Code New Customers Top Customers	Boss's Day	Reminder to customer for Boss' Day	Both	
		Christmas	Christmas/Seasons' Greetings letter	Both	
		Easter	Easter holiday letter	Both	
		Mother's Day	Mother's Day promotion/letter	Both	
		Rosh Hashanah	Rosh Hashanah letter	Both	
		Secretary's Day	Reminder for Secretary's Day	Both	
		Sweetest Day	Sweetest Day letter	Both	
		Thanksgiving	Thanksgiving Day holiday letter	Both	
		Valentine's Day	Valentine's Day letter	Both	
Reminder	Reminder	Anniversary	Anniversary reminder, personalized to name, recipient, occasion, and date.	Both	
		Birthday	Birthday reminder, personalized to name, recipient, occasion, and date.	Both	
		Special Occasion	Generic reminder, personalized to name, recipient, occasion, and date.	Both	
	Reminder—Holiday	Holiday reminder templates (Reminder templates are available for all holidays; Mother's Day, Easter, etc.)	Reminder to those customers who made purchases for recipients on a specific holiday last year.	Both	
Other	Sending florists	Sending florists	Thank you letter to sending florists	Letter only	
	Dormant Customer	Dormant Customer	To customers who haven't purchased in a while, personalized to name and last purchase date	Letter only	
	New Customers	New Customers	Welcome letter, targeted to new customers	Letter only	
	Recipients	Recipients	To recipients only	Letter only	
	Top Customers	Top Customers	Thank you letter to top customers/additional promotion	Letter only	
	All Customers Customers by Zip	Generic	Generic	Can include a custom message	Letter only
		Open House	Open House	Generic invitation to visit store.	Letter only
Seasonal		Seasonal	Promoting seasonal products	Letter only	

# Creating Direct Mail Marketing Campaigns

Direct mail marketing campaigns are campaigns that you intend to mail to your customers in a letter or postcard format. Before you begin, decide your target audience, occasion/purpose, and template. Templates are located on your hard drive in the C: \Wings\Office Marketing Templates folder. You may want to browse this directory and open some of the templates to see which ones you might want to use.

## Creating Direct Mail Marketing Campaigns Using Predefined Templates

Predefined campaigns are the quickest and easiest campaigns to generate. Most of the information is completed for you automatically. Predefined campaigns use existing templates that are already created for you with predefined merge fields. Therefore you cannot change the text of the template, unless you modify it (see [Creating a Single Postcard Template](#) on page 16–13) or create a new template (see [Creating a New Template](#) on page 16–11).

**TASK** To create a direct mail marketing campaign using a predefined template:

- 1 On the **FTD Mercury Main Menu**, click **Marketing**. The **Marketing Wizard** opens.
- 2 Click **Create a New Campaign**. The **Create Campaign** panel appears.
- 3 In the **Campaign Name** field, enter a name for your marketing campaign. Remember, this campaign can be used later, so make the name as specific as possible. For example, you might want to indicate if it is a postcard or letter, and whether the promotion is a reminder campaign or a generic one.
- 4 From the **Referral Code** list, select the referral code that you want to use for this campaign (or add a new one if you do not see one that you want to use). A referral code must be assigned to the campaign so that when the customer refers to the campaign, you can select the referral code in Order Entry or Point of Sale and later track how effective the campaign was.
- 5 Select **Direct Mail** as the **Distribution Type**.
- 6 From the **Campaign Type** list, select the type of campaign. Generally, you will use the **Holiday** or **Reminder** campaigns. Click **Next**.
- 7 The **Select Target List** panel opens. This panel allows you to select the target list of customers that you want to include in this mailing. Click **Select a predefined list**. This option allows you to select predefined customer lists, such as **All Customers**, **New Customers**, or **Top Customers**, or if this is a **Reminder** campaign, you are prompted for the occasion type (**Reminder** or **Reminder - Holiday**). Selecting a predefined list selects your output fields automatically. You will be prompted later in the wizard for some specific criteria, depending on the predefined list that you choose (for example, if you select **Top Customers**, you will later be prompted for the number of top customers). Click **Next**.
- 8 The **Key Criteria** panel opens. This panel allows you to select which criteria you want to use when selecting the customers to include in your marketing campaign. The options that display on this panel depend on which type of customer target list you selected. Provide the information that the program is prompting for, depending on the option that you chose in the Select Target List window.

Clicking **More Criteria** allows you to select more criteria for the customer merge.

**NOTE**

Keep these in mind:

- » If you are creating a reminder campaign, you most likely want to select dates for orders that were placed last year.
- » If you have multiple stores, remember to choose the store that contains the customer records that you want to extract. If you select the main store, the program does not extract duplicate customers if

you have customers saved at multiple stores. If you extract by Top Customers, the system extracts the top number of customers at the selected stores. However because the system is designed to eliminate duplicate records, the system eliminates duplicate top customers if the extracted customers are top customers at more than one store (therefore you may select to extract 100 top customers, but because duplicates are eliminated, only 50 are actually extracted).

- 9 Click **Next**.
- 10 The **Output Fields** panel opens. Output fields are the merge fields that are inserted into your document. Since you are using a predefined list (**All Customers**, **New Customers**, etc.), the output fields are selected for you. If you want to include more output fields than what are displayed in this window, you can click **More Fields** and select additional fields. Click **Next**.
- 11 The **Preview and Edit List** panel opens. This panel allows you to preview the list of customers before you save and execute your campaign. Before reaching the final panel in the wizard, review the list and see if you want to remove any customers from the campaign. Any records that are highlighted are missing information.

**NOTE**

If you type information in the grid, only the information for this specific customer list is saved (the information only is saved in this particular .csv file and is not saved in your customer database).

- » To exclude a customer from the list, right-click on the customer record and then click **Delete Row**.
- » To view the criteria that you selected throughout the wizard, click **View Criteria**.
- » If you want to change the criteria, click the **Back** button to go back to previous panel and change your selections.

- 12 Click **Next**.
- 13 On the **Save Campaign** panel, from the **Template** list, select the template you want to use. This should correspond to the holiday or reminder for which you are creating the campaign. If you want to see the template before merging, click **Preview**. You can change the text of the template by clicking the **Edit** button. Use this option only to change the text of the template.
- 14 If you want to print post cards, select this option. Postcards are printed four to an 8.5-by-11-inch sheet of paper. You also will need to fill in the **Return Address** area if you create post cards.
- 15 Select **Text Only** if you want to use a template that does not have any graphics. The letter is printed as formatted text only. This is useful if the paper you are printing on already has graphics.
- 16 In the **Sender** field, type the name of the person signing the letter or postcard, for example the manager or owner of the store.
- 17 Click **Generate Mailing Labels** if you want Microsoft Word to generate mailing labels. If you select this option, select **Three Across**.
- 18 Depending on whether you plan on sending your mailing list to an external printing service or whether you are printing the letters or postcards yourself, you can select to open the output in Microsoft Word. FTD recommends that if you are using a printing service, you do not select this option, and just send the customer file (located in C: \Wi ngs\Customer Li sts) and the template (located in C: \Wi ngs\Offi ce Templ ates\Mercury Forms) to the printing service. Otherwise, select **Open in Word**.
- 19 Select **Execute Campaign Now**.
- 20 Click **Finish**. If you did not select **Open in Word**, your customer list saves as a .csv file in the C: \Wi ngs\Customer Li sts directory. The file name is the campaign name followed by the date and time that you saved the campaign.

If you selected **Open in Word**, you receive a message stating that the merge will take a few minutes. Click **OK**. If you are merging a large number of customers, this process takes a few minutes. You will not see a progress bar or any indication that the program is working. Please be patient until you receive a response from the program letting you know that the merge is

complete. When the program is finished with the merge you will receive the message Mail Merge Operation completed successfully. The application will now be closed. Click **OK** to complete the process and close Mercury Marketing. Your letters/postcards will display in Microsoft Word.

- 21 To save the letters/postcards, click the **File** menu, then click **Save**. FTD recommends saving the file in the C:\Wings\Marketing Lists directory, so that you can access the letters by clicking the **Find my Merged Documents and Mailing Labels** on the first panel of the Marketing Wizard. Type a name and select a location to save the file, then click **Save**.
- 22 To print the letters/postcards, in Microsoft Word, on the **File** menu, click **Print**.

## Creating Direct Mail Marketing Campaigns Using Custom Templates

If you want to create a custom campaign (i.e., you are not using a predefined list of customers or a provided template), you must merge your customer information into Microsoft Word manually.

- » To learn how to create a new template (create a template from scratch, including letter text and merge fields), see [Creating a New Template](#) on page 16–11.
- » To learn how to change an existing template (start with an FTD-provided template, then change the text and/or merge fields), see [Creating a Single Postcard Template](#) on page 16–13.

## Creating a Birthday Reminder Direct Mail Campaign

**TASK** To create a birthday reminder direct mail campaign:

- 1 Launch the Mercury Marketing module.
- 2 On the **Welcome** panel, click **Create a New Campaign**.
- 3 In the **Campaign Name** field, type a name for the campaign (such as **Birthday Reminder**).
- 4 Select a referral code for the campaign. If you do not see the referral code you want to use, click **Add New Referral Code** and add it.
- 5 Select **Direct Mail** as the **Distribution Type**.
- 6 From the **Campaign Type** list, select **Reminder**.
- 7 Click **Next**.
- 8 On the **Select Target List** panel, click **Select a predefined list**. Select **Reminder** from the predefined list options at the bottom of the panel.
- 9 Click **Next**.
- 10 On the **Key Criteria** panel, if you have multiple stores, select a store from the **Store** list.
- 11 From the **Occasion** list, select an occasion. In this case, select **Birthday**.
- 12 In the **Delivery Date** field, select a beginning and ending delivery date.
- 13 Click **Next**.
- 14 On the **Output Fields** panel, review the fields that will be included. Click **Next**.
- 15 On the **Preview and Edit Lists** panel, review the list contents. Click **Next**.
- 16 On the **Save Campaign** panel, in the **Template** field, select **Birthday**. If you want to send a postcard instead of a letter, click **Post Card**.
- 17 In the **Sender** field, type the name of your shop or the owner name.
- 18 Select **Generate Mailing Labels** if you want to generate labels.
- 19 Select **Open in Word**.
- 20 Select **Execute Campaign Now**.
- 21 Click **Finish**.

The Mercury Marketing Wizard will process your selections. In a few minutes, Microsoft Word will open and merge all the customer information into the template. When the merge has finished, you can print the letters (or postcards, if you selected Post Card), or save the file to provide to a printing service.

## Creating a New Holiday Reminder Direct Mail Campaign

The Mercury Marketing module includes several predefined holiday reminder campaigns, including templates for letters and postcards. Available holidays include: Boss's Day, Christmas, Easter, Mother's Day, Rosh Hashanah, Secretary's Day, Sweetest Day, Thanksgiving, and Valentine's Day.

**TASK** To create a new reminder campaign for any of these holidays using the included templates:

- 1 Launch the Mercury Marketing module.
- 2 On the **Welcome** panel, click **Create a New Campaign**.
- 3 On the **Create Campaign** panel, in the **Campaign Name** field, enter your campaign name.
- 4 Select a referral code for the campaign (or add a new one if necessary).
- 5 Select **Direct Mail** as the **Distribution Type**.
- 6 From the **Campaign Type** list, select **Holiday**.
- 7 Click **Next**.
- 8 In the **Select Target List** panel, click **Select a predefined list**, and choose the list you want to use from the list at the bottom of the panel.
- 9 Click **Next**.
- 10 The options that display on the **Key Criteria** panel depend on the list you selected in the **Select Target List** panel. Provide the information requested and click **Next**.

- NOTE** If you have multiple stores, remember to choose the store that contains the customer records that you want to extract. If you select the main store, the program does not extract duplicate customers if you have customers saved at multiple stores. If you extract by Top Customers, the system extracts the top number of customers at the selected stores. However because the system is designed to eliminate duplicate records, the system eliminates duplicate top customers if the extracted customers are top customers at more than one store (therefore you may select to extract 100 top customers, but because duplicates are eliminated, only 50 are actually extracted).
- 11 The **Output Fields** panel displays all of the output fields that are available for extraction. Output fields are the merge fields that will be inserted into your document. Click **Next**.
  - 12 The **Preview and Edit List** panel allows you to preview the list of customers before you save your campaign. Before reaching the final panel in the wizard, review the list and see if you want to remove any customers from the campaign. To do this, right-click on the customer record and then click **Delete Row**. Any records that are highlighted are missing information.

- NOTE** If you type information in the grid, the information is saved only in this specific customer list (the information is saved only in this particular .csv file and is not saved in your customer database).
- 13 Click **Next**.
  - 14 On the **Save Campaign** panel, from the **Template** list, select the template you want to use. This should correspond to the holiday for which you are creating the campaign. If you want to see the template before merging, click **Preview**. You can change the text of the template by clicking the **Edit** button. Use this option only to change the text of the template.
  - 15 If you want to print post cards, select this option. Postcards are printed four to an 8.5-by-11-inch sheet of paper. You also will need to fill in the **Return Address** area if you create post cards.
  - 16 Select **Text Only** if you want to use a template that does not have any graphics. The letter is printed as formatted text only. This is useful if the paper you are printing on already has graphics.



- 17 In the **Sender** field, type the name of the person signing the letter or postcard, for example the manager or owner of the store.
- 18 Click **Generate Mailing Labels** if you want Microsoft Word to generate mailing labels. If you select this option, select **Three Across**.
- 19 Depending on whether you plan on sending your mailing list to an external printing service or whether you are printing the letters or postcards yourself, you can select to open the output in Microsoft Word. FTD recommends that if you are using a printing service, you do not select this option, and just send the customer file (located in C: \Wi ngs\Customer Li sts) and the template (located in C: \Wi ngs\Offi ce Templ ates\Mercury Forms) to the printing service. Otherwise, select **Open in Word**.
- 20 Select **Execute Campaign Now**.
- 21 Click **Finish**. If you did not select **Open in Word**, your customer list saves as a .csv file in the C: \Wi ngs\Customer Li sts directory. The file name is the campaign name followed by the date and time that you saved the campaign.  
If you selected **Open in Word**, you receive a message stating that the merge will take a few minutes. Click **OK**. If you are merging a large number of customers, this process takes a few minutes. You will not see a progress bar or any indication that the program is working. Please be patient until you receive a response from the program letting you know that the merge is complete. When the program is finished with the merge you will receive the message Mail Merge Operation completed successfully. The application will now be closed. Click **OK** to complete the process and close Mercury Marketing. Your letters/postcards will display in Microsoft Word.
- 22 To save the letters/postcards, click the **File** menu, then click **Save**. FTD recommends saving the file in the C: \Wi ngs\Marketin g Li sts directory, so that you can access the letters by clicking the **Find my Merged Documents and Mailing Labels** on the first panel of the Marketing Wizard. Type a name and select a location to save the file, then click **Save**.
- 23 To print the letters/postcards, in Microsoft Word, on the **File** menu, click **Print**.

## Creating Other (Third-Party) Marketing Campaigns

If you want to send a mailing to a printing service to distribute for you, FTD recommends that you save and send your list (.csv file) of customers only, and not merged into Microsoft Word letters. If you merge the list into Microsoft Word letters, the file will be too large to email. Using the Other option in the Marketing Wizard allows you to save the .csv file without merging the information into Microsoft Word letters.

### TASK To create a third-party marketing campaign:

- 1 Launch the Mercury Marketing wizard.
- 2 Click **Create a New Campaign**. The **Create Campaign** panel opens.
- 3 In the **Campaign Name** field, enter a name for your campaign.
- 4 In the **Referral Code** field, select the referral code for this campaign (or add a new one).
- 5 Select **Other** as the Distribution Type.
- 6 From the **Campaign Type** list, select the appropriate campaign type.
- 7 Click **Next**.
- 8 The **Select Target List** panel opens. On this panel, you select your customer target list. This determines the customers that will receive the direct mail promotion. You have several options:

- » **Select a predefined list**—allows you to select a predefined lists, with output fields determined automatically. You are prompted later in the wizard for specific criteria (depending on the list you choose).
- » **Build your own list**—allows you to create your own list of customers by specifying a list of criteria. Selecting this option prompts you if you want to build your own list **By Order** or **By Customer**. If you select **By Order**, you also have the option to select **All matching orders** or **Only one order per customer**. Selecting **Only one order per customer** ensures that, for example, if John Smith has placed three orders that meet your campaign criteria, his information is only extracted once (and therefore only one letter or postcard is printed for John Smith).
- » **Refresh list from a previous campaign**—allows you to use a target list from a previous campaign, but refresh it to use current information. Click **Select** to select the campaign that you want to use.
- » **Load a list from a previous campaign**—uses the exact list of customers from a previous campaign, without refreshing the list to bring it up to date. Click **Select** to select the campaign you want to use.

9 Click Next.

10 The **Key Criteria** panel opens. This panel allows you to select which criteria you want to use when selecting the customers to include in your marketing campaign. The options that display on this panel depend on which option that you selected in the previous panel.

If you selected **Build your own list** in the previous panel, the **Key Criteria** panel gives you the freedom to specify your own criteria. Select the criteria that you want to apply to the customer extraction by clicking on the criteria field, then typing in the key criteria.

If you selected **Select a predefined list** in the previous panel, provide the information that the program is prompting for in the **Key Criteria** panel, for example the number of top customers or a zip code range. You can click **More Criteria** to make your customer list more specific by selecting more criteria.

**NOTE**

If you have multiple stores, remember to choose the store that contains the customer records that you want to extract. If you select the main store, the program does not extract duplicate customers if you have customers saved at multiple stores. If you are extracting by Top Customers, the system extracts the top number of customers at the selected stores. However because the system is designed to eliminate duplicate records, the system eliminates duplicate top customers if the extracted customers are top customers at more than one store (therefore you may select to extract 100 top customers, but because duplicates are eliminated, only 50 are actually extracted).

11 Click Next.

12 The **Output Fields** panel opens. This panel lists all of the output fields that are available for extraction. Output fields are the merge fields that will be inserted into your document. For example, if you want to include the customer's name and address information at the top of the letter, you will want to select the **Customer Name, Address, City, State, and Zip** fields.

If you selected **Build your own list** in the **Select Target List** panel, this panel lists all available output fields from which you can. Select an output field by clicking on the field so that a check mark appears in the check box.

If you selected **Select a predefined list** in the **Select Target List** panel, the wizard lists the predefined output fields for you. You can select more output fields by clicking the **More Fields** button.

13 Click Next.

14 The **Preview and Edit List** panel opens. This panel allows you to preview the list of customers before you save your campaign. Before reaching the final panel in the wizard, review the list



and see if you want to remove any customers from the campaign. Any records that are highlighted are missing information.

**NOTE**

If you type information in the grid, it only saves the information for this specific customer list (the information is only saved in this particular .csv file and is not saved in your customer database).

- » To exclude a customer from the list, right-click on the customer record and then click **Delete Row**.
- » To view the criteria that you selected throughout the wizard, click **View Criteria**.
- » If you want to change the criteria, click the **Back** button to go back to previous panels and change your selections.

**15** Click **Next**. The **Save Campaign** panel opens.

**16** If you want to execute the campaign now (create the .csv customer list), click **Execute Campaign Now**, or click **Schedule** to schedule the campaign. If you are scheduling the campaign, click **Create** to create the schedule (see [Scheduling Campaigns](#) on page 16-9 for details).

**17** Click **Finish**. The campaign saves and you are returned to the Marketing Wizard main panel. If you selected **Execute Campaign Now**, your customer list is saved as a .csv file on your hard drive of your server in the C: \Wizards\Customer Lists directory. The file name is the campaign name, followed by the date and time that you saved the campaign.

**IMPORTANT**

Customer lists (.csv files) should not be viewed in Microsoft Excel (the data may be sorted incorrectly when viewing in Excel).

If you scheduled the campaign, the merged letters are saved in the C: \Wizards\Marketing Lists directory automatically each time they are generated according to the campaign schedule.

**18** The last step is to email or deliver the customer list to the third party distribution company. To email the customer list to the company, open your email inbox and attach the file from the C: \Wizards\Customer Lists directory.

## Scheduling Campaigns

When you save a campaign, you have the option of generating the campaign immediately (saving the customer list and/or merging the data into letters), or scheduling the campaign. Creating a schedule for a campaign is ideal for campaigns that you intend to run on a regular basis, for example monthly anniversary or birthday reminder letters. By creating a schedule, you are giving the Mercury Marketing application the information it needs to generate the campaign automatically, without you having to access the program.

Before scheduling the campaign, you must first create the campaign in the Marketing Wizard, specifying the target customer information (see [Creating Direct Mail Marketing Campaigns](#) on page 16-3). Before saving the campaign, select **Schedule** in the **Save Campaign** window:

**TASK**

**To create a campaign that will be generated on a schedule:**

- 1** Create the campaign in the Mercury Marketing Wizard. Ensure you do not save the campaign in the last panel of the wizard.
- 2** Before saving the campaign, select **Schedule** in the **Save Campaign** panel. Click **Create** to create the campaign schedule. The Campaign Scheduler opens.
- 3** Specify the start and end dates for the campaign in the **Start Date** and **End Date** fields. This will be the period of time the campaign will be generated for you automatically.

- 4 Select if you want to run the campaign daily, weekly, monthly, or annually. You are selecting how often you want the campaign to be generated. For example, if you select **Monthly** for a date range of April 1 2006 to April 1 2007, a campaign will be generated for each month (12 campaigns will be generated).
- 5 If you want to be notified when a list is generated, select the **Notify me by E-mail after Generating the List** and enter your email address in the **E-mail** field. This email message will remind you to distribute the campaign.
- 6 In the **Date Range** section, click either **Fixed** or **Floating**. The **Fixed** option should be used for non-reminder campaigns that do not require a range of data to be used. For example, if you are sending out a yearly Mother's Day, Easter, Valentine's Day, etc., campaign, and if your campaign is not related to specific order data in your system, select the **Fixed** option.  
The **Floating** option should be used for reminder campaigns, when the campaign requires a range of data (such as orders placed from April 1, 2005 to April 30, 2005). For example, if you are sending out a **Birthday** reminder template and you want to use order information from last year's orders, select the **Floating** option.
- 7 Click **Generate**. The **Campaign Scheduler** will list your campaign schedule. The **Starting** and **Ending** columns list the date range that will be used to extract order information. If you selected the **Fixed** option, the **Starting** and **Ending** columns will be blank.
- 8 Click **OK** to save the information and return to the **Save Campaign** panel in the Marketing Wizard.
- 9 On the **Save Campaign** panel, click **Finish**.

## Campaign Analysis

The Mercury Marketing module allows you to analyze marketing campaigns so you can track sales generated by your campaigns. Sales that are entered with a marketing campaign's referral code in Order Entry or Point of Sale are sales that are tracked by the Campaign Analysis tool.

**NOTE** The Campaign Analysis tool only displays orders that were entered in FTD Mercury (Order Entry and Point of Sale). To analyze sales statistics for orders that were placed online, go to the Constant Contact Web site (<http://ftd.constantcontact.com>) and run a campaign analysis.

**TASK** To analyze a campaign:

- 1 Launch the Mercury Marketing Wizard.
- 2 On the **Welcome** panel, click **Analyze a Campaign**.
- 3 In the **Campaign Analysis** window, in the **Date Range** area, enter the date range in which the campaign was run.
- 4 Click **Refresh** to list the campaigns that meet the date range you selected.
- 5 From the results list, select the campaign for which you want to view results.
- 6 In the **Report By** area, select whether you want to view the **Summary Report** (which lists the total dollar amount and number of orders that were generated by the campaign) or the **Detail Report** (which lists each individual order that was generated by the campaign).
- 7 Click **View Results**. The Mercury Marketing Wizard will generate the report you selected.

## Deleting Campaigns

You can delete campaigns from the Campaign Analysis window.

**TASK** To delete a campaign from the Campaign Analysis window:

- 1 Select the campaign from the list and click **Delete**. If you do not see the campaign in the list, you may have to change the criteria at the top of the panel and then click **Refresh**.
- 2 A message appears, warning you if you delete the selected campaign, it will delete other campaigns that were run with the same campaign name, including campaign schedules. Click **Yes** to delete the campaign or click **No** to return to the **Campaign Analysis** window.

## Templates

FTD has provided you with dozens of templates to choose from for direct mail marketing (see the list of templates in [Marketing Campaigns](#) on page 16-2). These templates can be found in the C:\Wings\Office Marketing Templates directory.

## Modifying an Existing Template

Modifying an existing template allows you to take advantage of the professional look of the predefined template, yet customize it to meet your needs.

This procedure teaches you how to change the merge fields in the template. If you want to only change the text in the template, you can do this by clicking the **Edit** button in the **Save Campaign** panel at the end of the Marketing Wizard.

**TASK** To change merge fields in a template:

- 1 Create a marketing campaign using the Marketing Wizard in the Mercury Marketing application. However, choose not to open the campaign in Microsoft Word (make sure **Open in Word** is not checked), or if the program asks you if you want to open a new Microsoft Word document to begin the merge, click **No** (you will open the existing template instead).
- 2 Open the template you want to change. To do this:
  - a. Open Windows Explorer by right-clicking on the **Windows Start** button and clicking **Explore**.
  - b. Navigate to the C:\Wings\Office Marketing Templates folder and locate your template:
  - c. Double-click on the template to open it.
- 3 Continue with step 2 in [Creating a New Template](#) on page 16-11. [Creating a New Template](#) on page 16-11, changing the text or merge fields in the file as necessary. Make sure that before you merge the customer information into the document, save the template using the **Save As** command from the **File** menu (make sure that you are saving the document as a **Document Template**). It is suggested to save it with the other templates, in the C:\Wings\Office Marketing Templates directory.

If you want to change a predefined template permanently, save it using the same file name.

To reuse the template in the future, follow the procedure in this section again; however you will not change or rename the file as instructed in step 3 above.

## Creating a New Template

Creating a new template from scratch gives you the freedom to create any type of template that you want. You can select your own merge fields, type a letter from scratch, then merge the customer information extracted from your FTD Mercury database.

Before creating the template, you must extract a customer list (.csv file) so you can merge the customer list into the custom template. See [Creating Direct Mail Marketing Campaigns Using Custom Templates](#) on page 16-5 to create your marketing campaign.

Your customer list was saved as a .csv file in the C: \Wings\Customer Lists directory on the server. This is the file that you need to import into Microsoft Word after you design your new template.

**TASK** To create a new template:

- 1 To begin, open Microsoft Word by clicking the **Windows Start** menu, pointing to **All Programs**, then clicking **Microsoft Word**. (Microsoft Word may be located in the Microsoft Office folder.)
- 2 In Microsoft Word, on the **Tools** menu, point to **Letters and Mailings**, and click **Mail Merge Wizard**.
- 3 At the bottom of the right pane, click **Next: Starting document**.
- 4 At the bottom of the right pane, click **Next: Select recipients**.
- 5 In the right pane, under **Use an existing list**, click **Browse**.
- 6 Navigate to the C: \Wings\Customer Lists folder on the server, highlight the .csv file (the customer list that was generated by the campaign in the Mercury Marketing Wizard), then click **Open**.
- 7 The list of mail merge recipients opens up. These are the customers that met the criteria that you specified for the campaign in the Mercury Marketing Wizard. Review the list of customers. If you want to remove a customer from the list, click on the check box next to the customer to remove the check mark. To help you review the list, you can click on the column headings to sort the information. Click **OK** when you are finished.
- 8 At the bottom of the right pane, click **Next: Write Your Letter**.
- 9 On the blank Microsoft Word document, type your template letter. To insert a merge field, first put your cursor in the letter where you want to insert the merge field, then click **More items** in the right pane. A window opens with the available merge fields.
- 10 To insert a merge field, first make sure that **Database Fields** is selected at the top of the window, then select the merge field and then click **Insert**. The merge fields display in your letter with brackets (<<>>).
- 11 If you want to insert graphics, do so now. If you have a graphic on file that you want to use (like your company logo or letterhead), import that graphic. (On the **Insert** menu, point to **Picture**, and click **From File**. Navigate to and select the graphic to import it in your document.)

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**TIP** Microsoft Word comes with clip art that is already installed on your computer. If you want to browse through available clip art, on the **Insert** menu, point to **Picture**, and click **Clip Art**. The **Insert Clip Art** pane displays on the right side of the screen. Here you can browse through and select clip art to include in your template.

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- 12 Spell check your template. To begin the spell check, on the **Tools** menu, click **Spelling and Grammar**.
- 13 When you are finished designing your template, at the bottom of the right pane, click **Next: Preview your letters**.
- 14 Page through your letters to make sure that the merge appears the way you want. To page through the letters, in the right pane, under **Preview your letter**, click the left and right arrows (<< and >>). If you want to make any changes to the template, at the bottom of the right pane, click the **Previous: Write your letter**.
- 15 When you are ready to merge the customer information, at the bottom of the right pane, click **Next: Complete**.
- 16 You have two options: **Print** and **Edit Individual Letters**. If you want to print the document now, click **Print**. If you want to edit individual letters before you print them, click **Edit Individual Letters**.
- 17 When the **Merge to New Document** window opens, select **All** then click **OK** to print all of the letters. Alternatively, you can just print the current document, or indicate a range of records to

print. The letters display in Microsoft Word, where you can page through them and make any necessary changes. When you are ready to print them, click **File**, then click **Print**.

- 18 Save the template. If you want to use the template again to reuse later, save the template as a Microsoft Word template. To do this:
  - a. On the **File** menu, click **Save**.
  - b. In the **Files of Type** field, make sure it reads **Document Template**.
  - c. Give the template a name in the **File name** field, select a location to save the file (it is suggested to save it with the other templates, in the C: \Wings\Office Marketing Templates directory), then click **Save**.

## Creating a Single Postcard Template

The Mercury Marketing predefined postcard templates are formatted to print four postcards per sheet of paper. If you have postcard stock that is formatted for one postcard per sheet of paper, you will have to create a new template that is specially formatted to print on your postcard stock paper.

To do this, first extract a customer list (.csv file) so that you can merge the customer list into the custom postcard template. See [Creating Other \(Third-Party\) Marketing Campaigns](#) on page 16-7 to create your .csv file.

Next, follow the steps in [Creating a New Template](#) on page 16-11 to create your new template and insert your merge fields. However while you are writing your letter in Microsoft Word, format the margins of the document so that the template fits on your paper. This involves some trial and error. After creating your template, try printing it on your postcard stock paper to see if it is aligned correctly. You may have to make adjustments so that it prints correctly.

For help on formatting in Microsoft Word, consult your Microsoft Word documentation.

## Email Marketing Campaigns

If you have not already considered marketing by email, here are a few reasons why it is more efficient and effective than traditional mail marketing—and why it can save you money:

- » **It is much less expensive**—no labor costs or expenses for paper, envelopes and stamps
- » **It saves time**—email marketing campaigns only take a couple of minutes to send, compared with the long process of printing, addressing, and mailing letters
- » **Templates are already created for you**—they are colorful, professional, and contain personalized customer information
- » **Email marketing generates an immediate response from your customers**—email messages can be received by your customers within minutes
- » **Campaign results are tracked instantly**—you can use the Constant Contact Web site to track how many customers have placed orders using links in your marketing email messages
- » **Establish and build relationships**—email marketing keeps you in touch with current and prospective customers and builds lasting relationships

## Creating Email Campaigns in the Marketing Wizard

As you begin creating an email campaign, keep in mind that only customers with email addresses are extracted for the campaign.

**TASK** To create an email campaign using the Marketing Wizard:

- 1 On the **FTD Mercury Main Menu**, click **Marketing**. The **Marketing Wizard** opens.
- 2 Click **Create a New Campaign**.
- 3 On the **Create Campaign** panel, in the **Campaign Name** field, enter a campaign name. Remember that this campaign can be used later, so make the campaign name as specific as possible (for example, indicate that it is an email campaign).
- 4 In the **Referral Code** field, select the referral code that you want to give the campaign that you are creating. A referral code must be assigned to the campaign so that you can track sales that were generated by the campaign during campaign analysis.  
If you do not see the referral code you want to use, click **Add New Referral Code**, type the new referral code and then click **Add**. The new referral code is available to use in the Marketing Wizard immediately, however you must restart FTD Mercury and Mercury Administration for the new referral code to display in those programs.
- 5 Select **Email** as the **Distribution Type**.
- 6 From the **Campaign Type** list, select the appropriate campaign type.
- 7 Click **Next**.
- 8 In the **Select Target List** panel, select the target list for your campaign. Your options are:
  - » **Select a predefined list**—This allows you to select a predefined list of either all your customers, new customers, top customers, or customers by ZIP code. Select the appropriate customer list from the box on this panel.
  - » **Refresh list from a previous campaign**—This allows you to use a target list of customers from a previously executed campaign, but it also refreshes the data to include any new or changed customers that meet the criteria for that campaign. Click **Select** to select the campaign from which the list will be refreshed.
  - » **Load a list from a previous campaign**—This loads an exact list of customers that was used in a previous campaign. Click **Select** to select the campaign from which the list will be loaded.
- 9 Click **Next**.
- 10 The options that display on the **Key Criteria** panel depend on the options selected in the **Select Target List** panel. Provide the information requested and click **Next**.

**NOTE**

- If you have multiple stores, remember to choose the store that contains the customer records that you want to extract. If you select the main store, the program does not extract duplicate customers if you have customers saved at multiple stores. If you extract by Top Customers, the system extracts the top number of customers at the selected stores. However because the system is designed to eliminate duplicate records, the system eliminates duplicate top customers if the extracted customers are top customers at more than one store (therefore you may select to extract 100 top customers, but because duplicates are eliminated, only 50 are actually extracted).
- 11 The **Output Fields** panel displays all of the output fields that are available for extraction. Output fields are the merge fields that will be inserted into your document. Click **Next**.
  - 12 The **Preview and Edit List** panel allows you to preview the list of customers before you save your campaign. Before reaching the final panel in the wizard, review the list and see if you want to remove any customers from the campaign. Any records that are highlighted are missing information.

**NOTE**

- If you type information in the grid, the information is saved only in this specific customer list (the information is saved only in this particular .csv file and is not saved in your customer database).
- » To exclude a customer from the list, right-click on the customer record and then click **Delete Row**.
  - » To view the criteria that you selected throughout the wizard, click **View Criteria**.



- » If you want to change the criteria, click the **Back** button to go back to previous panels and change your selections.
- 13** Click **Next**. The **Save Campaign** panel opens.
- 14** Select **Generate Email List Now** to save the campaign and generate the .csv customer list now, and/or click **Schedule** to schedule the campaign. If you are scheduling the campaign, click **Create** to create the schedule (see [Scheduling Campaigns](#) on page 16–9 for details).
- 15** If you want to upload the customer file to the Constant Contact Web site now, select **Launch Constant Contact eMail Marketing Website** so that your browser can take you to the Constant Contact Web site.
- 16** Click **Finish**. The campaign saves and you are returned to the Marketing Wizard main panel. If you selected **Generate Email List Now**, your customer list is saved as a .csv file on your hard drive in the C: \Wings\Customer Lists directory. The file name is the campaign name followed by the date and time that you saved the campaign.

**NOTE**

Customer lists are only saved in the C: \Wings\Customer Lists directory on the server. If you are working on a client PC, you must retrieve the .csv on the server PC in that directory. Clicking the **Find my Previous Lists** link does not find the customer list on the client PC.

**IMPORTANT**

Customer lists (.csv files) should not be viewed in Microsoft Excel (the data may be sorted incorrectly when viewing in Excel).

If you Scheduled the campaign, the email messages are sent automatically according to the schedule that you specified.

- 17** The next step is to upload the customer file to the Constant Contact Web site. If you did not select **Launch Constant Contact eMail Marketing Website** to access the marketing Web site now, you will later have to go to the Constant Contact Web site at <http://ftd.constantcontact.com> to upload the file.

## Executing Your Email Marketing Campaign on the Constant Contact Web Site

After creating an email marketing campaign within Mercury Marketing, you can upload the campaign to the Constant Contact Web site at <http://ftd.constantcontact.com> to execute your campaign.

Email marketing distribution is billed separately by Constant Contact, the company that maintains the email marketing Web site. FTD has partnered with Constant Contact to create a seamless email marketing Web site for you to use on your own. The Web site includes easy-to-use, professional marketing templates for you to use. You simply upload your marketing campaign (customer email list) to the Constant Contact marketing Web site, customize the templates, and create a sending schedule. The email messages are sent with the information you want to send, when you want to send it.

Constant Contact does not allow you to upload third-party customer lists (i.e., lists that you purchase). You may only upload lists of customers that you already have a relationship with (customers that reside in your database). New anti-spam laws are now in place with penalties. Constant Contact is at the forefront of these new laws.

### Guidelines for Developing Email Campaign Messages

If you are using email marketing, here are a few things to consider before beginning.

## Maximize Deliverability

- » Avoid SPAM trigger words like “discount” and “free” in your email text. These words are SPAM (junk mail) triggers and may be caught by some customers’ email filter programs that help avoid SPAM. Constant Contact will pre-screen your text and subject lines for trigger words and prompt you to change them. If you want to use these words, it is recommended to embed them into graphics.
- » Use subject lines that will capture attention.

## Tips for Writing Content

Although Constant Contact will provide predefined templates on their site, keep these tips in mind if you decide to change any of the text. Also, please refer to Constant Contact Central (located upon registration on the Constant Contact Web site) for more tips and tricks for creating successful campaigns.

- » Be short and to the point. Remember email is the fastest growing marketing channel and consumer mailboxes are packed.
- » Make sure your message is about the customer and what you can do for them. It should be more “you” focused than “we” focused.
- » Keep the most important part of your message at the top. Avoid making the customer scroll down—they may not.
- » Before using personalization, take a realistic look at the integrity of the data you are using. Is it reliable? If you reference a previous purchase, are you referencing a full product name, or rather an abbreviation that will make little sense to your customer?
- » Consider customers who share email addresses. What if you reference a gift sent by the husband to someone his wife would object to, and they both read the email at the same home email address?
- » Use of personalization may not improve response across lists. You need to test it with different types of customers. If you decide to use personalization, have some targeted letter copy in addition to their personalized name.
- » People respond to incentives. Test some and incorporate the ones that work into your offers.

## Creating a List of Customer Email Addresses

If you want to create a list of customers and their email addresses for other uses, you can do so using the Mercury Marketing Wizard.

**TASK** To create a list of customers and their email addresses:

- 1 Launch the **Mercury Marketing Wizard**.
- 2 On the **Welcome** panel, click **Create a new Campaign**.
- 3 On the **Create Campaign** panel, in the **Campaign Name** field, enter a name for the campaign.
- 4 From the **Referral Code** list, select a referral code to use for this campaign. Alternatively, click **Add New Referral Code** to create a new referral code to use.
- 5 For the **Distribution Type**, select **Direct Mail**. (This may seem counterintuitive, but it is the correct choice.)
- 6 From the **Campaign Type** list, select the appropriate campaign type.
- 7 Click **Next**.
- 8 On the **Select Target List** panel, select **Build Your Own List**, and then select **By Customer**.
- 9 Click **Next**.
- 10 On the **Key Criteria** panel, ensure all options are cleared and click **Next**.

- 11 On the **Output Fields** panel, select **Customer Name** and **Customer Email Address**. Ensure all other options are cleared.
- 12 Click **Next**.
- 13 On the **Preview and Edit List** panel, review the list of customers and their email addresses. If you want to remove a customer from this list, right-click on the customer and click **Delete Row**. When you are satisfied with the list, click **Next**.
- 14 On the **Save Campaign** panel, select **Execute Campaign Now**.
- 15 Click **Finish**.

You will receive a message informing you of the name and location of the file containing the customer names and email addresses, which you can open in Microsoft Excel. The files are typically stored in C: \Wings\Customer Lists\Customer Lists for Manual Merging.

## Mercury Marketing Wizard Reference

The Mercury Marketing Wizard contains the following panels and windows:

- » [Welcome Panel](#)
- » [Create Campaign Panel](#)
- » [Select Target List Panel](#)
- » [Key Criteria Panel](#)
- » [Output Fields Panel](#)
- » [Preview and Edit List Panel](#)
- » [Save Campaign Panel](#)
- » [All Campaigns Window](#)
- » [Add New Referral Code Window](#)
- » [Campaign Analysis Window](#)
- » [All Criteria Window](#)
- » [Selected Criteria Window](#)
- » [Campaign Scheduler Window](#)

### Welcome Panel

When you open the **Mercury Marketing** module, the **Marketing Wizard** opens. The first panel in the wizard gives you the option of creating a new campaign or analyzing a campaign you have already executed.

Figure 16-1: Welcome Panel



To create a new marketing campaign, click the **Create a new Campaign** button. The Marketing Wizard will take you through the campaign creation process. To analyze a campaign that you have already run, click **Analyze a Campaign**. You will then select the campaign that you would like to analyze, and the program will display a sales by referral code report to show you the sales that were generated by the campaign.

The links at the bottom of the panel allow you to jump to directories on your computer where you have saved customer lists and merged marketing letters.

The **Find my Previous Lists** link takes you to the C:\Wings\Customer Lists directory on your computer. This is where your customer lists (.csv files) are saved by default. Customer lists are generated when you create marketing campaigns.

**NOTE**

Customer lists are only saved in the C:\Wings\Customer Lists directory on the server. If you are working on a client PC, you must retrieve the .csv on the server PC in that directory. Clicking the **Find my Previous Lists** link will not find the customer list on the client PC.

The **Find my Merged Documents and Mailing Labels** link takes you to the C:\Wings\Marketing Lists directory on your computer. This directory is where merged and scheduled marketing campaigns are saved by default.

The **Find my Pre-Built Templates** link opens the C:\Wings\Office Marketing Templates directory on your computer. This directory is where you can find your FTD-provided marketing templates (\*.dot files).

## Create Campaign Panel

The **Create Campaign** panel allows you to enter the name of the new campaign and a unique referral code, set the distribution type, and specify the campaign type. You can also load a previous campaign to refresh and run it again.

Figure 16-2: Create Campaign Panel

You can configure the following settings:

Table 16-2: Create Campaign Panel Settings

Setting	Description
<b>Campaign Name</b>	<p>Enter a unique name for this campaign. This should be easily understandable, for example “Mothers Day Email” for a Mother’s Day promotional email message. Remember that this campaign can be used later, so make the campaign name as specific as possible (for example, indicate that it is an email or direct mail campaign).</p> <p>If you click <b>Load Previous Campaign</b>, the <b>All Campaigns</b> window opens, allowing you to select an existing campaign to load.</p>
<b>Referral Code</b>	<p>Select a referral code you will use to differentiate this campaign when customers act on it. This will help you determine the campaign’s effectiveness. The Referral Code list has several predefined codes.</p> <p>If you click <b>Add New Referral Code</b>, you can enter a new code to ensure that you can determine the impact of this campaign. The new referral code will be available to use in the Marketing Wizard immediately, however you must restart FTD Mercury and Mercury Administration for the new referral code to display in those programs.</p>

**Table 16-2: Create Campaign Panel Settings (cont.)**

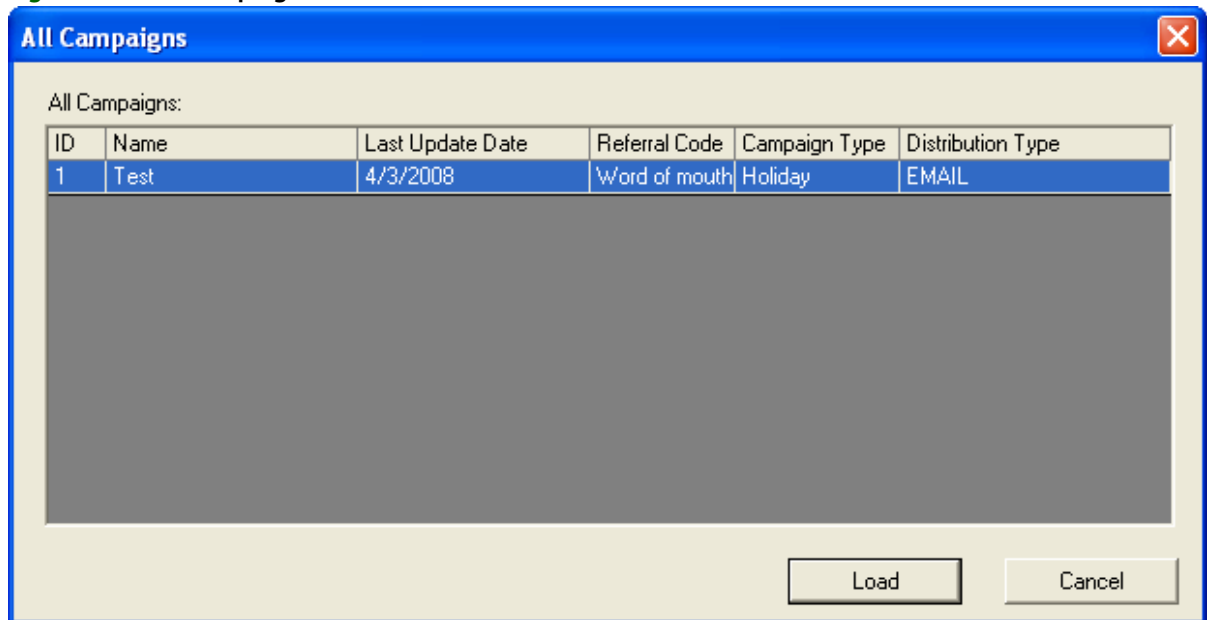
Setting	Description
<b>Distribution Type</b>	<p>Select one of the following distribution types:</p> <ul style="list-style-type: none"> <li>» <b>Email</b>—Select this option if your marketing campaign will use email messages as the distribution method. Email campaigns are quicker and less expensive than traditional direct mail campaigns, but you need to collect customer email addresses so you can send your message to your customers.</li> <li>» <b>Direct Mail</b>—Use for physical mail campaigns.</li> <li>» <b>Other</b>—Select this option if you plan to send the customer list or merged letters to a third party company for distribution.</li> </ul> <p><b>NOTE:</b> If you are creating an email campaign, only customers with email addresses will be extracted for your marketing email messages.</p>
<b>Campaign Type</b>	<p>Select the campaign type from this list. You can select from the following:</p> <ul style="list-style-type: none"> <li>» Holiday</li> <li>» Reminder</li> <li>» Other</li> </ul>

Click **Next** to proceed to the **Select Target List** panel. Click **Back** to return to the **Welcome** panel.

## All Campaigns Window

This window displays all past campaigns that you have run. To load a campaign, highlight the campaign in the list and then click **Load**.

**Figure 16-3: All Campaigns Window**



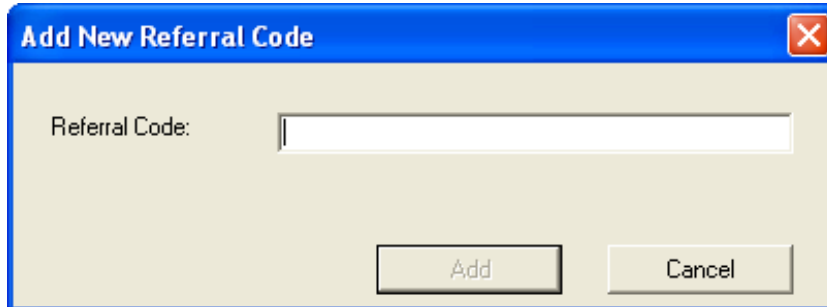
## Add New Referral Code Window

The **Add New Referral Code** window allows you to enter a new referral code for a marketing campaign. This code is used to analyze the effectiveness of a particular marketing campaign, and therefore, should be unique. Typically, it should also be short so it can be seen in the Order Entry and Point of Sale windows.



Type the new referral code in the text field then click **Add**. You will receive a warning message stating that you will have to restart the FTD Mercury and Mercury Administration programs for the referral code to be visible in those programs. Click **OK** to accept the message.

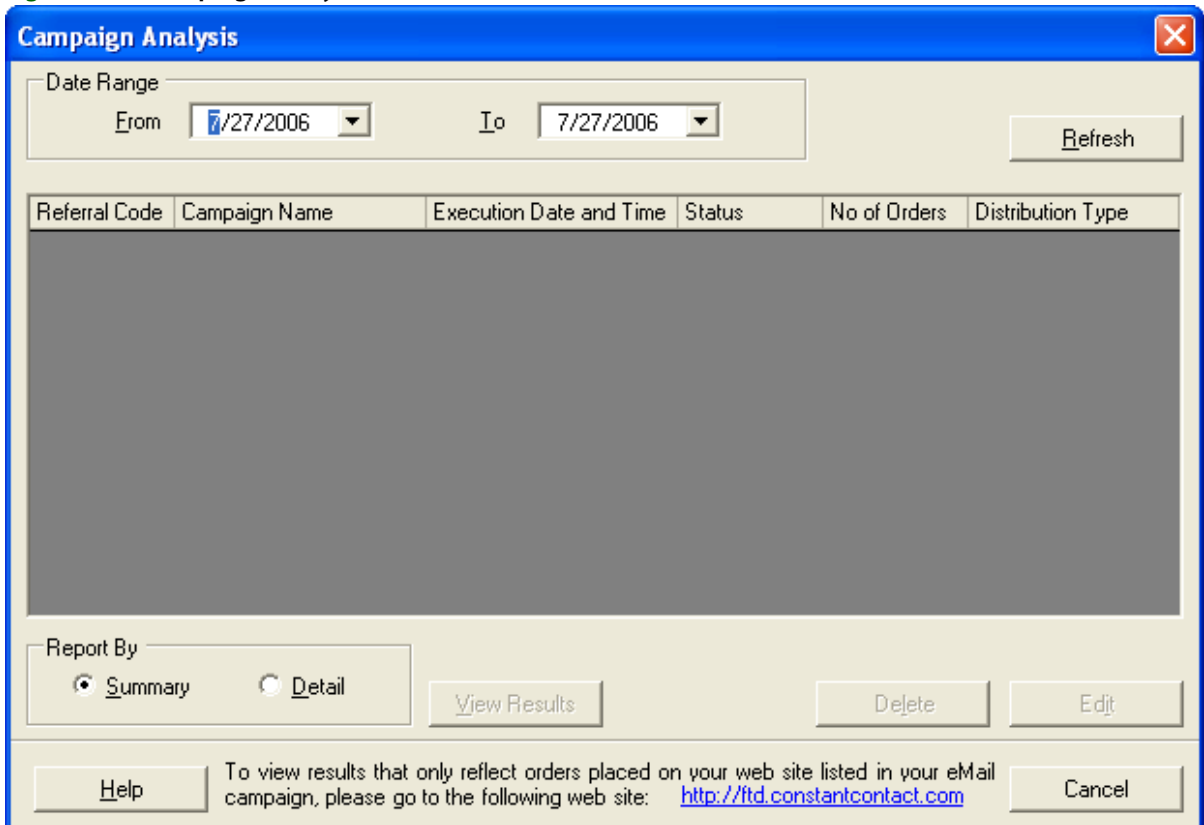
**Figure 16-4: Add New Referral Code Window**



## Campaign Analysis Window

So that you can track sales generated by marketing campaigns, the Mercury Marketing application allows you analyze marketing campaigns that you have run from the marketing wizard. Sales that are entered with a marketing campaign's referral code in Order Entry or Point of Sale are sales that are tracked in the **Campaign Analysis** window.

**Figure 16-5: Campaign Analysis Window**



### NOTE

The Campaign Analysis tool only displays orders that were entered in FTD Mercury (Order Entry and Point of Sale). To analyze sales statistics for orders that were placed online, go to the Constant Contact website ([www.constantcontact.com](http://www.constantcontact.com)) and run a campaign analysis.

Complete the following fields on this window:

- » **Date Range**—Select a date range that the campaigns were run.
- » **Report By**—Indicate if you would like to view the Summary Report or the Detailed Report. The Summary Report lists the total dollar amount and number of orders that were generated by the campaign. The Detailed Report lists each individual order that was generated by the campaign.

Click **Refresh** to list the campaigns that meet the criteria you selected at the top of the window. To view campaign results for a campaign, highlight that campaign and then click **View Results**. Your report will display in Microsoft Word.

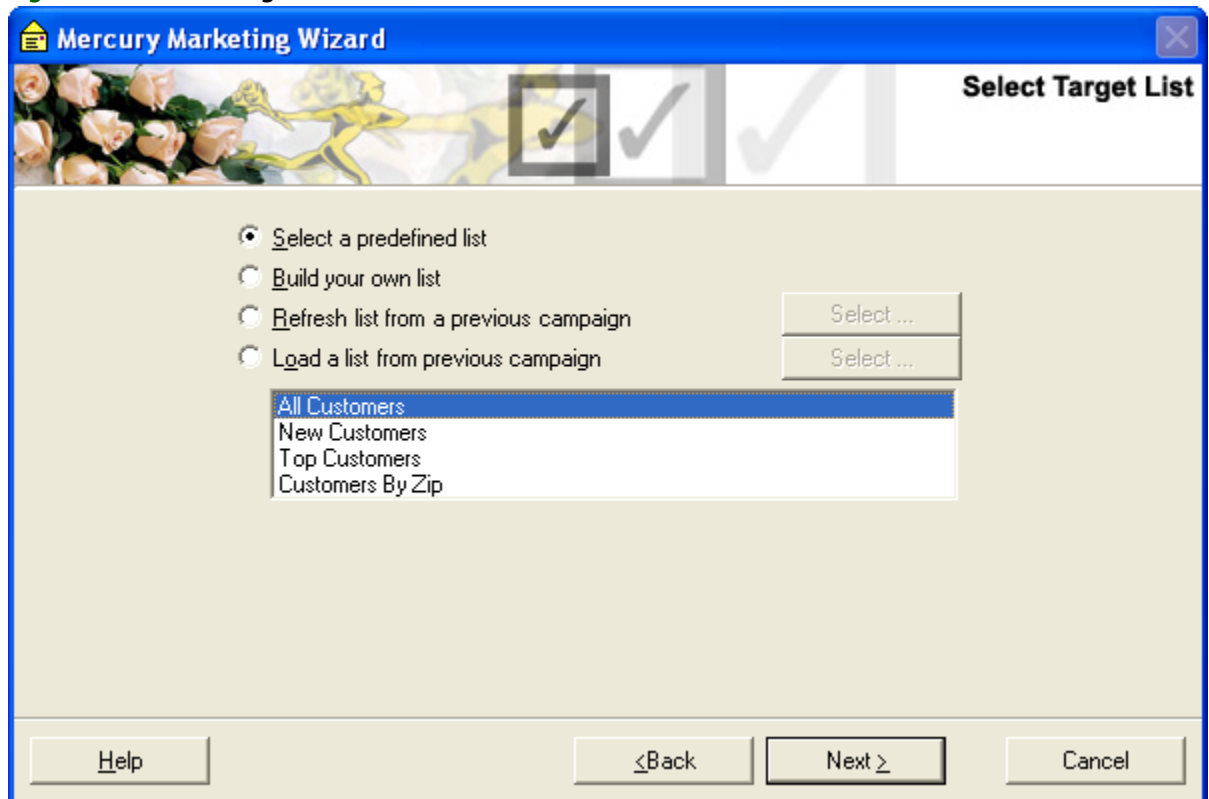
### Deleting Campaigns

You can delete campaigns in the **Campaign Analysis** window. To delete a campaign, highlight the campaign in the list and then click **Delete** (if you do not see the campaign in the list, you may have to change the criteria at the top of the window and then click **Refresh**). If you delete a campaign, it will delete other campaigns that were run with the same campaign name, including campaign schedules. Click **Yes** to delete the campaign or click **No** to return to the **Campaign Analysis** window.

## Select Target List Panel

The **Select Target List** panel allows you to specify the target audience for the marketing campaign.

Figure 16-6: Select Target List Panel



You can select from the following options for your target list:

**Table 16-3: Set Target List Panel Settings**

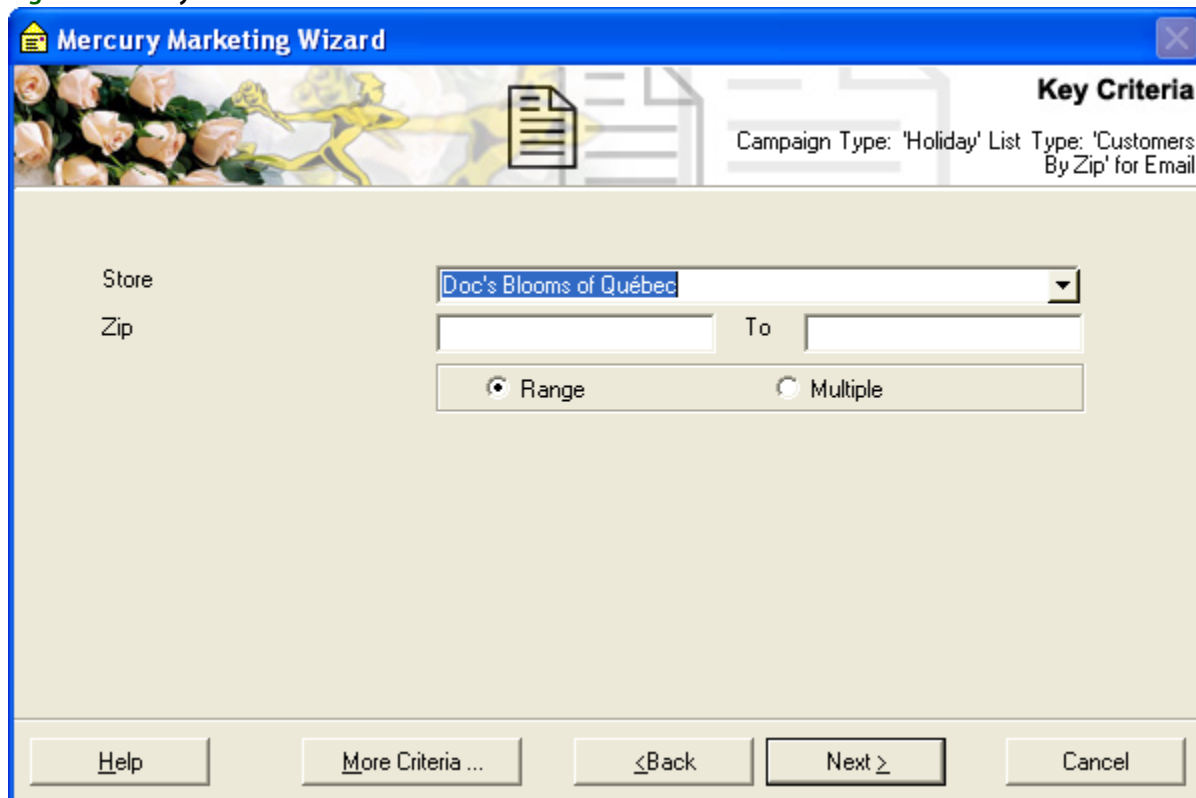
Setting	Description
<b>Select a predefined list</b>	This option allows you to select a predefined customer list, such as <b>All Customers</b> , <b>New Customers</b> , or <b>Top Customers</b> . If you select one of these options, later you will be prompted for more specific information, for example the number of top customers or a range of ZIP codes.
<b>Build your own list</b>	<p>This option allows you to create your own list of customers by specifying a list of criteria. Selecting this option will then prompt you if you would like to build your own list By Order (in the next panel you will select ORDER fields to extract by, such as Delivery Date and Occasion) or By Customer (in the next panel you will select CUSTOMER fields to extract by, such as Customer Number and ZIP Code).</p> <p>If you select <b>By Order</b>, you will also have the option to select All matching orders or Only one order per customer. Selecting Only one order per customer ensures that for example, if John Smith has placed three orders that meet your campaign criteria, his information will only be extracted once (and therefore only one email will be printed for John Smith).</p>
<b>Refresh list from a previous campaign</b>	<p>This option allows you to select a target list of customers from a previous campaign and refresh it to take into account any changed data (such as new customers or changed customer information) since the list was originally generated.</p> <p>If you select this option, click <b>Select</b> to display the <b>All Campaigns</b> window, from which you can select a previous campaign target list to refresh.</p>
<b>Load a list from previous campaign</b>	<p>This option allows you to target a list that you have already targeted. The list will be exact; it will not be refreshed if the criteria for creating the original list has changed. If new orders or customers were saved since the extraction of the previous campaign, these orders/customers will NOT be added to your customer list.</p> <p>If you select this option, click <b>Select</b> to display the <b>All Campaigns</b> window, from which you can select a previous campaign target list to load.</p>

Click **Next** when you are finished with this panel to move to the next panel of the wizard.

## Key Criteria Panel

The **Key Criteria** panel allows you to select the criteria you want to use when selecting the customers to include in your campaign. The options on this panel depend on the options you selected in the **Select Target List** panel.

Figure 16-7: Key Criteria Panel



If you selected **Build your own list** in the **Select Target List** panel, the **Key Criteria** panel gives you the freedom to specify your own criteria. Select the criteria that you would like to apply to the customer extraction by clicking on the criteria field, then typing in the key criteria.

Figure 16-8: Key Criteria Panel for Build Your Own List

Mercury Marketing Wizard

**Key Criteria**

Campaign Type: 'Holiday' List Type: 'By Customer' for DirectMail

Store  
 Customer #  
 Billing Cycle  
 Alphabetical Sort  
 City  
 State  
 Zip  
 Country

Range  Multiple

Help <Back Next > Cancel

If you selected **Select a predefined list** in the **Select Target List** panel, provide the information that the program is prompting for in the **Key Criteria** panel, for example the number of top customers or the ZIP code range. You can click the **More Criteria** button to select more criteria, if you would like your customer list to be more specific.

#### NOTE

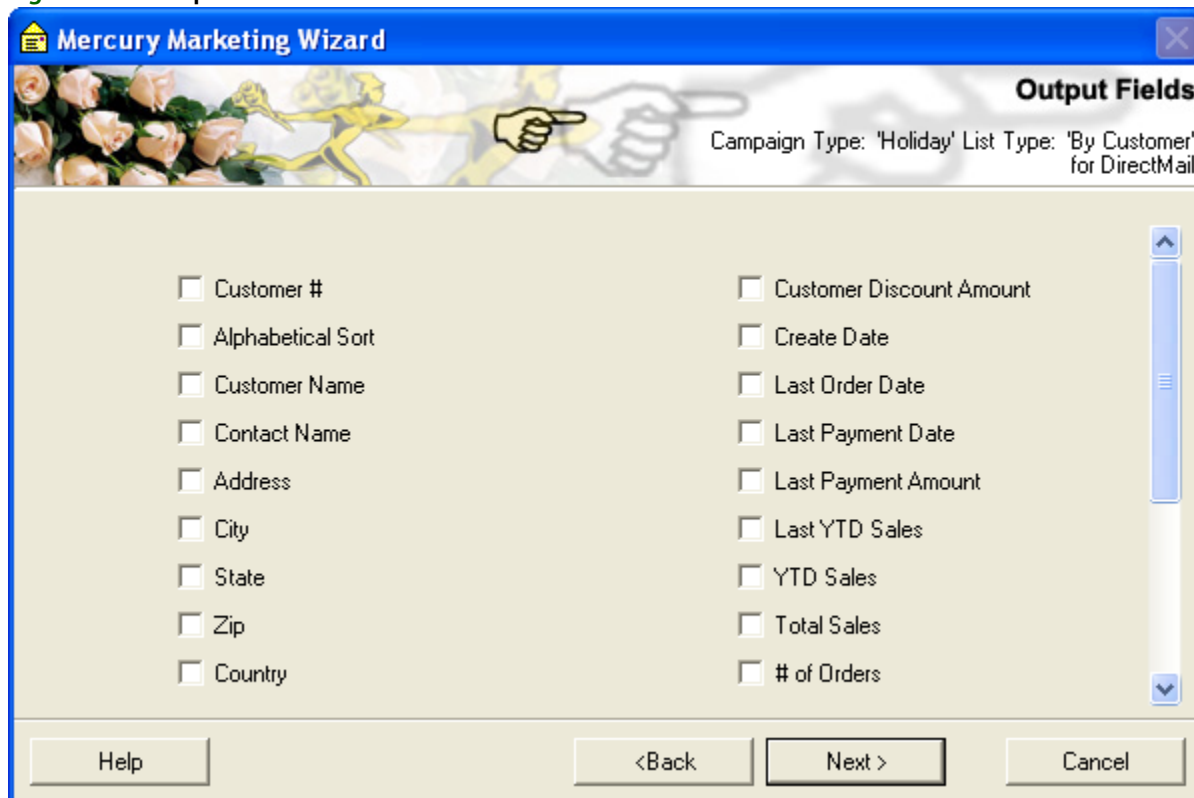
If you have multiple stores, remember to choose the store that contains the customer records that you would like to extract. If you select the main store, the program will not extract duplicate customers if you have customers saved at multiple stores. If you are extracting by Top Customers, the system will extract the top number of customers at the selected stores. However because the system is designed to eliminate duplicate records, the system will eliminate duplicate top customers if the extracted customers are top customers at more than one store (therefore you may select to extract 100 top customers, but because duplicates are eliminated, only 50 will actually be extracted).

Click **Next** when you are finished with this panel to move to the next panel of the wizard.

## Output Fields Panel

The **Output Fields** panel lists all of the output fields that are available for extraction. Output fields are the merge fields that you will insert into your template or email. For example, if you want to include the customer's name and address information at the top of a letter, you will want to select the Customer Name, Address, City, State, and Zip fields. If you are creating an email campaign, you must select an email address for either the customer or recipient (this information must be extracted so the email can be sent). You will be warned if an email address is not selected.

Figure 16-9: Output Fields Panel



If you selected **Build your own list** in the **Select Target List** panel, this panel will list all available output fields for you to select from. Select an output field by clicking on the field so that a check mark appears in the check box.

If you selected **Select a predefined list** in the **Select Target List** panel, the wizard will list the predefined output fields for you. You can select more output fields by clicking the **More Fields** button. However, if you do add additional fields, you will deviate from the predefined campaign to the point where your campaign is actually a custom campaign. You will then have to use Microsoft Word to manually merge fields before you save your campaign.

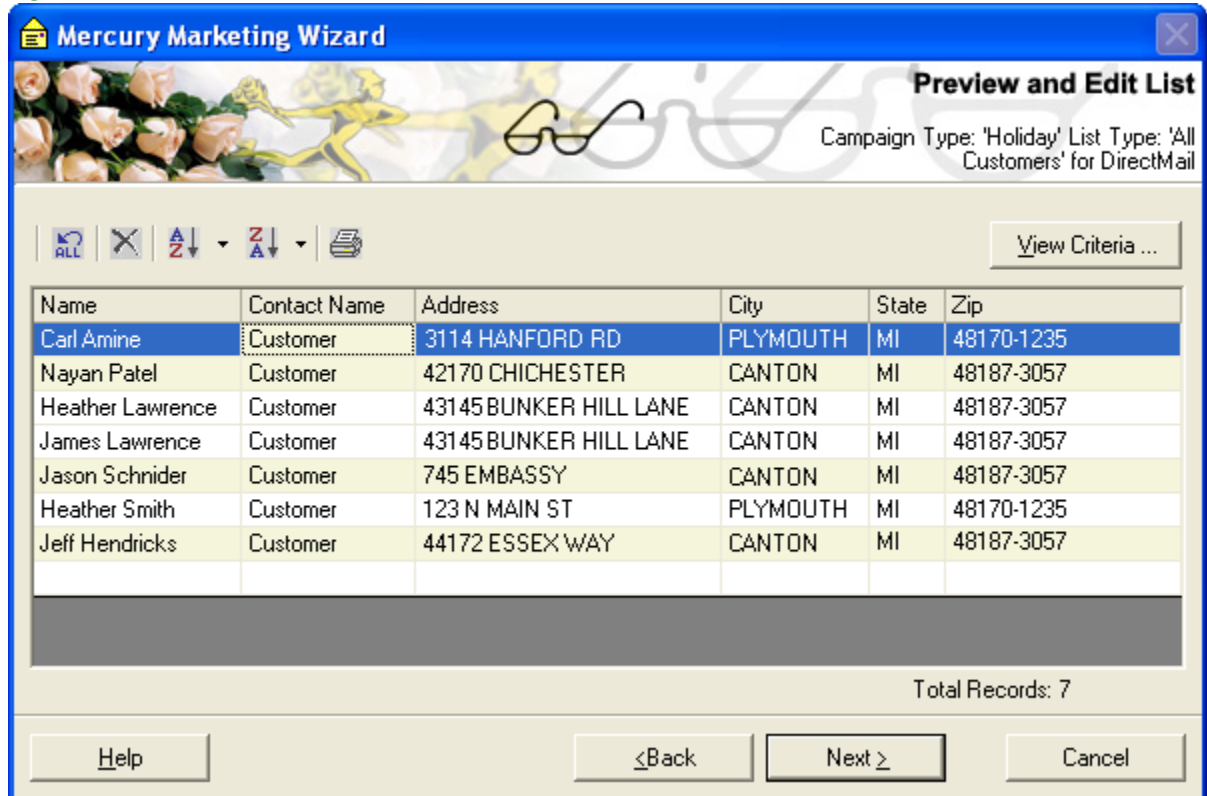
If you click **More Fields**, you can select fields to include from the **All Output Fields** window. Click **Back** to return to the **Key Criteria** panel; click **Next** to proceed to the **Preview and Edit List** panel.

## Preview and Edit List Panel

The **Preview and Edit List** panel allows you to see the target list before you save the campaign. You should take this opportunity to verify the list is what you expected. It is possible that you will need to click the **Back** button to change some of the previous options. If you are not sure of the criteria, click **View Criteria** to display the **Selected Criteria** window.



Figure 16-10: Preview and Edit List Panel



FTD Mercury automatically highlights entries in the list that may have problems (such as incomplete data). You can either fill in or change the data, or you can right-click the row and delete the entry entirely. If you elect to modify an entry, it will only be changed for this mailing list and not in the customer record.

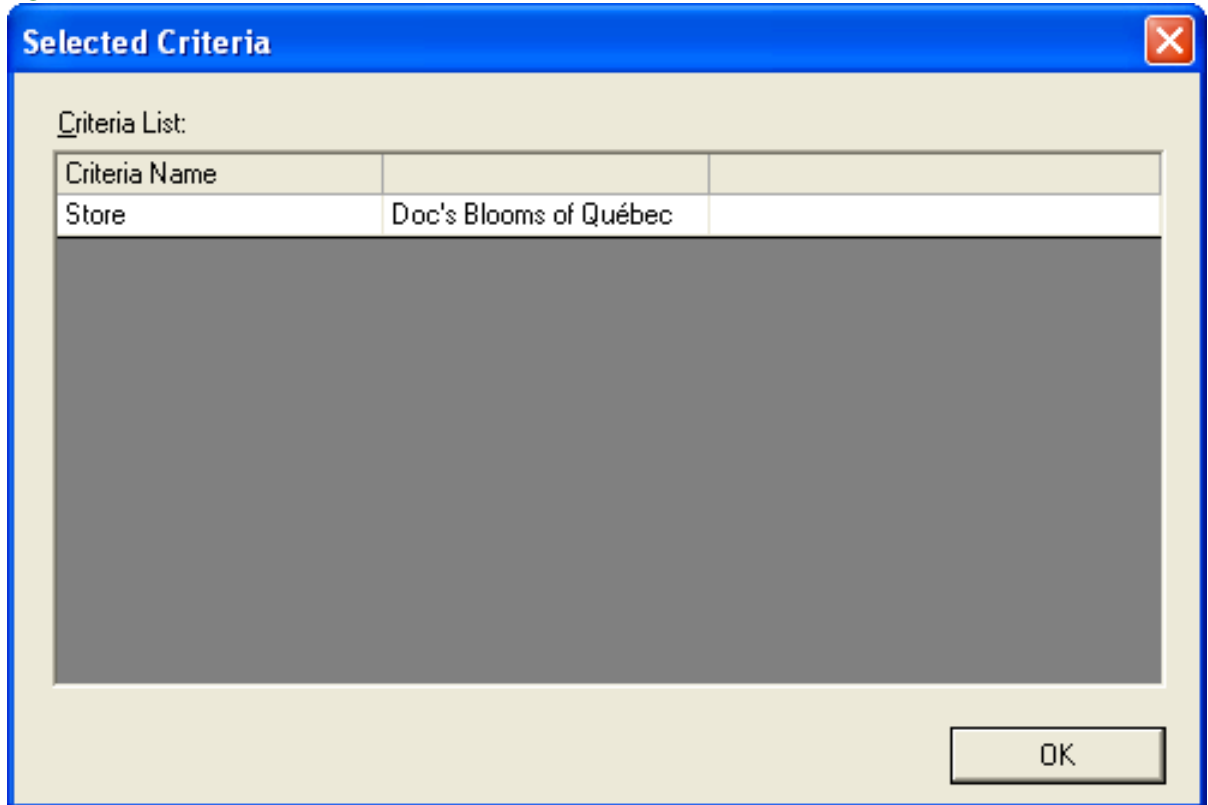
**NOTE** Although this panel allows you to type information in the grid, it will only save the information for this specific customer list (the information will only be saved in this particular .csv file and will not be saved to your customer database).

Click **Back** to return to the **Output Fields** panel, or click **Next** to proceed to the **Save Campaign** panel.

## Selected Criteria Window

The **Selected Criteria** window opens when you click **View Criteria** in the **Preview and Edit List** panel. This window allows you to see the criteria selected for the campaign. When you close this window, you can go back through the Mercury Marketing Wizard to make changes if necessary.

Figure 16-11: Selected Criteria Window



## Save Campaign Panel

The **Save Campaign** panel allows you to select options for saving your marketing campaign, such as whether you would like to execute the campaign now or schedule it, if you would like to generate mailing labels, etc.

Figure 16-12: Save Campaign Panel

The screenshot shows the 'Save Campaign' panel in the Mercury Marketing Wizard. The window title is 'Mercury Marketing Wizard' and the panel title is 'Save Campaign'. The campaign type is 'Holiday' and the list type is 'All Customers' for DirectMail. The Campaign Name is 'Spring is Sprung', the Referral Code is 'Word of mouth', and the Template is 'Select Template...'. There are checkboxes for 'Execute Campaign Now', 'Schedule', 'Generate Mailing Labels', and 'Open in Word'. A 'Create ...' button is visible.

Following are your options in the Save Campaign window (options will vary depending on what type of campaign you are creating):

Table 16-4: Save Campaign Panel Settings

Setting	Description
<b>Campaign Name</b>	This field lists the campaign name that you entered in the first wizard panel. You can change it if you wish.
<b>Referral Code</b>	This field lists the referral code that you entered in the first wizard panel. You can change it if you wish, or click <b>Add New Referral Code</b> to add a new referral code.
<b>Generate Email List Now</b>	This option is for email marketing campaigns only. Select this option to save the campaign and generate the .csv customer list now.  <b>NOTE:</b> Customer lists (.csv files) should not be viewed in Microsoft Excel (the data may be sorted incorrectly when viewing in Excel).
<b>Execute Campaign Now</b>	This option is for direct mail marketing campaigns only. Select this option to save the campaign and merge the letters now.
<b>Schedule</b>	Select this option to schedule the campaign. If you are scheduling the campaign, click <b>Create</b> to create the schedule.

The following fields are for direct mail campaigns only:

**Table 16-5: Direct Mail Campaign Settings**

Setting	Description
<b>Template</b>	Select the pre-defined template that you would like to use. If you would like to see the template before merging, click <b>Preview</b> .
<b>Post Card</b>	If you would like to print post cards, this option will print four post cards per 8.5" x 11" sheet of paper. If you select this option, make sure post card stock paper is loaded in the printer.  <b>NOTE:</b> You can find post card stock paper at your local office supply store, or you can order it through FTD Marketplace at 1-800-767-4000.
<b>Text Only</b>	Select this option if you would like to use a template that does not have any graphics. The letter will be printed as formatted text only.
<b>Sender</b>	Type the name of the person signing the letter or postcard, for example the manager or owner of the store.
<b>Generate Mailing Labels</b>	If you would like Microsoft Word to generate mailing labels, click this option, then select <b>Three Across</b> .
<b>Open in Word</b>	If checked, the letters/postcards will open in Microsoft Word when the merge is complete. If unchecked, the merge will take place but the document will not open in Microsoft Word. The file will be saved in the C:\Wings\Office Templates\Mercury Forms directory.  If you plan to send a list and template to a printer, we recommend that you do NOT check Open in Word. Just locate the customer file in the C:\Wings\Customer Lists directory and locate the template in the C:\Wings\Office Templates\Mercury Forms directory and send these to the printer.
<b>Return Address</b>	If you are printing post cards, the Return Address section will become active. The information you type here will display in the return address section of the postcard. Complete the Return Address fields with your shop's address.

Click **Finish**. The campaign will save and you will be returned to the **Marketing Wizard** main panel.

If you selected **Generate Email List Now** or **Generate Mailing Labels Now**, your customer list is saved as a .csv file on your hard drive in the C:\Wings\Customer Lists directory (to view the files in this directory, navigate to it in Windows Explorer, or click the **Find my Previous Lists** link in the first panel of the Marketing Wizard). The file name will be the campaign name, followed by the date and time that you saved the campaign.

**NOTE** Customer lists are only saved in the C:\Wings\Customer Lists directory on the FTD Mercury server. If you are working on a client PC, you must retrieve the .csv on the server PC in that directory. Clicking the **Find my Previous Lists** link will not find the customer list on the client PC.

Customer lists (.csv files) should not be viewed in Microsoft Excel (the data may be sorted incorrectly when viewing in Excel).

If you scheduled the campaign, the merged letters will be saved in the C:\Wings\Marketing Lists directory automatically each time they are generated according to the campaign schedule (to view the files in this directory, navigate to it in Windows Explorer, or click the **Find my Merged Documents and Mailing Labels** link in the first panel of the Marketing Wizard). If the campaign is an email campaign, the emails will be sent according to your schedule.

## Campaign Scheduler Window

When you save a campaign, you have the option of generating the campaign immediately (saving the customer list and/or merging the data into letters), or scheduling the campaign. Creating a schedule for a campaign is ideal for campaigns that you intend to run on a regular basis, for example monthly anniversary or birthday reminder letters. By creating a schedule, you are giving the Mercury Marketing application the information it needs to generate the campaign automatically, without you having to access the program. The Campaign Scheduler allows you to create this schedule.

**Figure 16-13: Campaign Scheduler Window**

Campaign:	Starting:	Ending:
7/27/2006 4:05 PM		
8/27/2006 4:05 PM		
9/27/2006 4:05 PM		
10/27/2006 4:05 PM		
11/27/2006 4:05 PM		
12/27/2006 4:05 PM		

### TASK To create the schedule:

- 1 Specify start and end dates for the campaign in the **Start Date** and **End Date** fields. This will be the period of time that the campaign will be generated for you automatically.
- 2 Select if you would like to run the campaign **Daily**, **Weekly**, **Monthly**, or **Yearly**. Here you are selecting how often you would like the campaign to be generated.
- 3 If you would like to be notified when a list is generated, click **Notify me by Email after Generating the List** and type your email address in the Email field. This will remind you to distribute the campaign.
- 4 In the **Date Range** section, click either **Fixed** or **Floating**. The **Fixed** option should be used for non-reminder campaigns that do not require a range of data to be used. For example, if you are sending out a yearly Mother's Day, Easter, Valentine's Day, etc. campaign and is not related to specific order data in your system, select the Fixed option. The **Floating** option should be used for reminder campaigns, when the campaign requires a range of data (such as "orders placed from April 1, 2003 to April 30, 2003"). For example, if you are sending out a Birthday reminder and you would like to use order information from last year's birthday orders, select the Floating option.
- 5 Click **Generate**. The Campaign Scheduler will list your campaign schedule. The campaign will be run on the date listed in the **Campaign** column. The **Starting** and **Ending** columns list the

- date range that will be used to extract order information. If you selected the **Fixed** option, the **Starting** and **Ending** columns will be blank.
- 6 Click **OK** to save the information and return to the Save Campaign window of the Marketing Wizard.
  - 7 Click **Finish** in the **Save Campaign** window.

## All Criteria Window

The All Criteria window allows you to specify which customers you would like to include in the marketing campaign. For example, you may want to only include customers within certain zip codes or only customers with a particular billing cycle.

To select criteria, first click on a field's check box to select that field, then in the text area type or select the criteria for your marketing campaign. When you are finished selecting criteria, click **OK** to return to the **Key Criteria** panel.