

The Marketing module allows you to create letters, lists and reports based on customer activity across all departments. This could be anything from a thank-you follow up letter from the Sales Department to a routine Service Reminder letter from within Workshop.

Running a promotion

Once you have initially set up your promotions, running a promotion is as easy as 1, 2, 3.

- 1- In the Marketing Module select the Promotion button.



- 2- Select the Promotion required and the Output Type. Then select Run

A dialog box titled 'Run Promotion'. It contains a 'Promotion:' dropdown menu with 'All Farm Customers' selected. To the right, 'Last Run on:' is set to '20/08/2012'. Below that, 'Between:' is set to 'and' with a date '23/11/4538' in a dropdown. There is a checkbox for 'Trial Run?' which is unchecked. The 'Output Type:' dropdown is set to 'SMS'. At the bottom, there are 'Run' and 'Close' buttons.

- 3- Add a message or use one already saved in the library and select OK to send

A dialog box titled 'Send SMS Message'. It has tabs for 'General', 'Recipients', and 'Sample'. The 'Message:' field contains the text: 'Dear *6*, A new model TRX ATV has arrived come in and see. Be in quick as we have limited stock. See you soon, Honda'. The character count '118' is shown. There is a 'Library' button. A 'Delayed?' checkbox is unchecked. At the bottom, there are 'OK' and 'Cancel' buttons.

Creating the Promotion

Orion Marketing is based on running "Promotions". You can setup a promotion based on a range or parameters. To create new promotions within the Marketing Module select Maintenance > Promotions. This will open the Promotion Listing. Select Insert.

This will open the Promotion Maintenance screen shown below.

The screenshot shows the 'Promotion Maintenance' dialog box with the following fields and options:

- General** | Filters | More Filters | Item Filters | Prospect Filters | Notes | History
- Promotion Code: CUST-ALL
- Name: All Customer
- Options: Type: All Customers
- Output: Template, Style File, Print Afterwards, Use Printer, Save Into Folder, Default Output: Browse List
- Buttons: OK, Cancel

General

1. *Promotion Code*: Keycode for this Promotion.
2. *Name*: Full description for this Promotion.
3. *Type*: Orion has several different promotion types for you to select from this drop-down list.
4. *Days After Invoice/ Days Forward*: Depending on the Type of Promotion you select you will get either of these two options, either Days after invoice is used for Sales Follow ups, or Days Forward is used for Service Reminders where the letter has to go out before the WOF expires.
5. *Default Output*: It is recommended that you select Browse List as your Default Output. This will allow you to view the recipients and remove them prior to sending out the promotion.

Examples of Types

Options	
Type:	Sales Invoice Followup
Days After Invoice:	Sales Invoice Followup Workshop Invoice Followup Parts Invoice Followup Rental Invoice Followup Item Followup
Output	
Template:	Customer Last Activity Followup Customer Creation Followup Birthday Followup
Style File:	All Customers All Customers with Item Debtors Followup Prospect Task Followup
Use Printer:	All Prospects Dealer Warranty Followup
Save Into Folder:	Mechanical Warranty Followup Manufacturer Warranty Followup

Sales Invoice Followup: Used to send thank you for purchase promos, can also use the “More Filters” to define the promo for a specific salesperson.

Workshop Invoice Followup: Can be used to send a promo to customers with a certain Make/Model that have had a workshop invoice in the last few weeks.

Item Follow up: Used to send follow up reminders

Customer Last Activity Followup: Can be used to generate a list of lapsed customers to either report on or send a promo.

All Customers & All Customers with Item: Used to create promos to all the customers but can also be used with the filters, More Filters and item filters to send to specific customer groups i.e. Farm 2 wheel customers, customers that own a TRX350 etc

Prospect Task Followup and All Prospects: Similar to the Customer type, used to create promos to all the Prospects.

Filters; More Filters; Item Filters; Prospect Filters Tabs

The screenshot shows a window titled "Promotion Maintenance" with a tabbed interface. The tabs are: General, Filters, More Filters, Item Filters, Prospect Filters, Notes, and History. The "Filters" tab is currently selected and highlighted with a red box.

You are able to specify various different filters to narrow the selection so that you can be more specific in the customers / prospects you would like to target.

Filters: Where specific customer analysis groups can be selected.

More Filters: Where keywords (which are linked to customers/Prospects) can be selected to target certain groups.

Item Filters: Where specific Makes/Models are selected to target certain bike owners.

Prospect Filters: Where prospect referral source and industry can be selected to define a promotion.

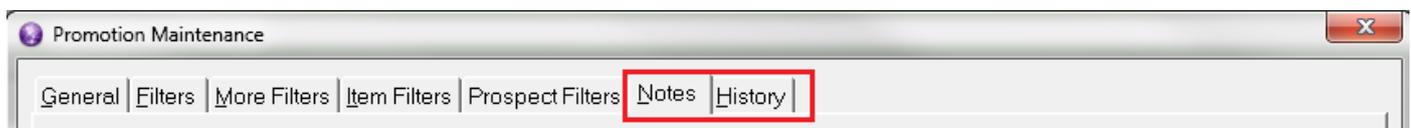
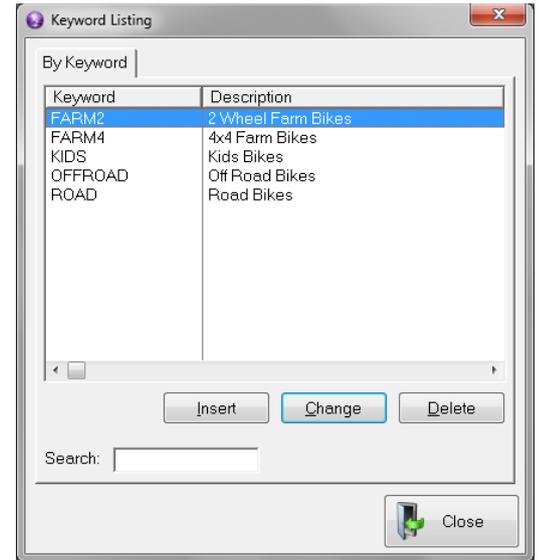
Keywords

A special note can be made about keywords which can be used to select customers with special buying requirements, such as farm 4 wheel, or road. These are initially setup within the Marketing Module and are linked to a customer from within their Customer Maintenance screen.

Here are some examples of Keywords and how they could be applied. You could link a customer to the Keyword "farm wheel" if you know that they have an interest. You could then run a promotion to all buyers of quad bikes to inform them of a new Model that is available.

You could link a customer to the Keyword "road bikes", and then they could receive promotional material relating to a sale on new helmets that the Parts Department is running. Or using a combination of Keywords and Promotional Filters you could link a Customer to off road rec, then send all Sales Customers who have purchased a trail bike in the past six months a letter advising them that they will go in the draw for tickets to the motocross if they complete and return a marketing survey.

To create a new Keyword, select Keywords from the Maintenance Menu and select the "Insert Button". Enter a Keyword and a Description and select OK to Save.



Notes

You can add notes about the promotion here.

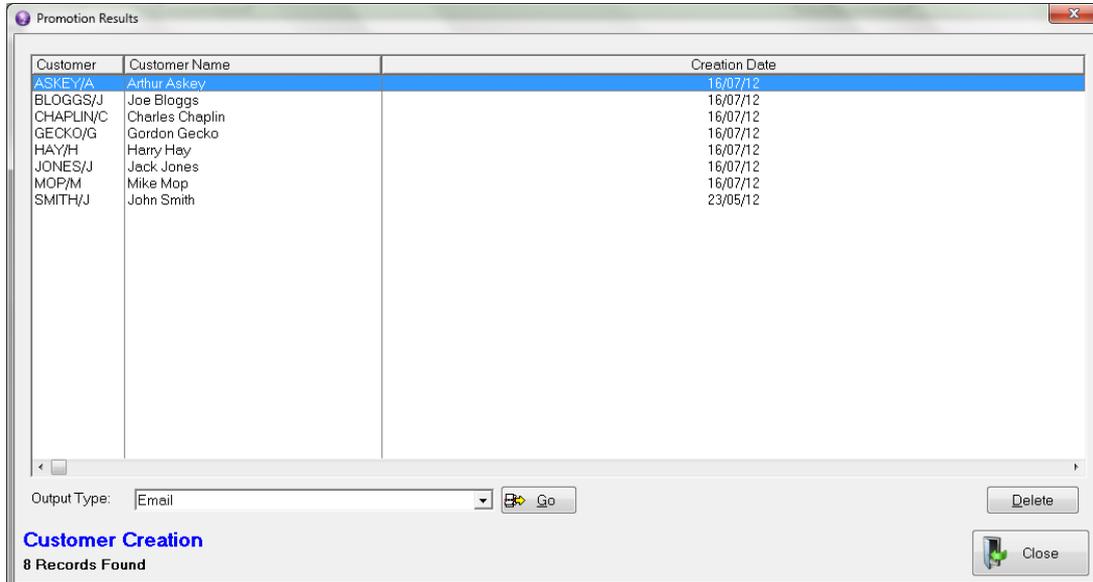
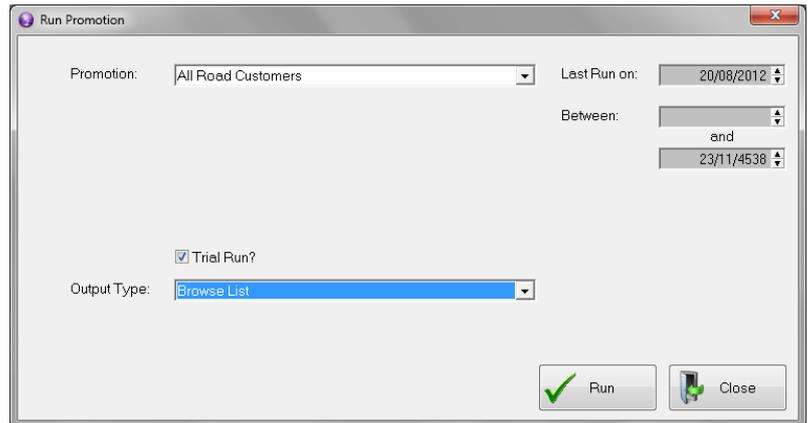
History

When a promotion is run there is a record kept of when the promotion was run and which customers received the promotion.

Select OK to save the Promotion.

Running a Promotion (in Detail)

1. Click on the "Run Promotion" button.
2. Select the Promotion that you are running from the Promotion drop-down list.
3. When a promotion is run, Orion will flag all of the customers who have been included. This is to prevent them being included twice if dates are accidentally overlapped between different promotional runs. Selecting the "Trial Run" options will run the promotion but will not update the Promotion History against any of the customers.
4. Select the Output Type from the drop-down list. I recommend "Browse List" to allow you to easily edit the customer list before sending.
5. Select "Run" to run the promotion.
6. If you selected output type of Browse list the system will show you a list of customers/Items that match the filter and keyword parameters of your promotion. You can remove people from this list by highlighting them and selecting "Delete".
7. Select the Output Type required:
 - Word Mail merge: Requires a Word template to be set up first
 - SMS: Sends a text message. Requires a plan and a valid customer mobile number
 - Email: Sends an email. requires a valid customer email address
 - Tasks: Used to create salesperson follow up tasks, from the generated list.



8. Select Go.