MARKETING MODULE

CONTENTS

BULK MAILERS

The marketing module is used to maintain contact with your clients in the form of letters, email or SMS text messaging. For example you can send appointment reminders, specials, enticements to visit via a communication method that can be individually selected by each client.

How to Set Up a Bulk Mailer

1. Click on the **'Reports'** button.
2. Double-click on the **'Bulk Mailers'** button or the **'Reminders / Recalls'** button if you are creating a reminder letter.
3. The report properties window will open.
4. Next click on the **'Add New'** button.
5. Click **'Yes'** to the **'Design New Report'** prompt.
6. In the **'Name'** field enter the name for the letter, email or SMS (e.g. Thank You Letter).
7. From the **'Category'** drop down list select what category the bulk mailer will appear.
8. From the **'Printer'** drop down list, choose the printer to which this document will print if it is a letter.
9. From the table link drop down menu choose which table link you wish to use for this document. For simple client lists select **'Cln -> Bil -> Anm'**. If you are doing a reminder or recall this will be automatically selected.
10. Depending on the link you select you can then choose the tables to get information from in the **'Use Following Tables'** section. If you are doing a reminder or recall these will be automatically selected.
11. Choose any special filters that you may wish to use. For example, if you have ticked the patient or billing boxes in **'Use following tables'** and you only want to send one bulk mailer per client, select **'One per client'** from the drop-down list.

12. Under the **'Use Client Marketing Tab'** section, select which clients to send documents, emails or SMS messages to by clicking on the drop-down list in each field. This section uses the information set up in the client record.

Document	
Don't Send:	Letters will not be generated for clients.
If Address Entered:	In the client record under the **'General'** tab, if an address is entered, a letter will be created for that client.
If Mailers chkbox Ticked in 'By Post':	In the client record under the **'Marketing'** tab, if the **'Mailers'** check box is ticked in the **'Send By Mail'** section, a letter will be created for that client.
If Reminders chkbox Ticked in 'By Post':	In the client record under the **'Marketing'** tab, if the **'Reminders'** check box is ticked in the **'Send By Mail'** section, a letter will be created for that client.

Email	
Don't Send Emails:	Emails will not be generated for clients.
If Email Entered:	In the client record under the general tab, if an email address is entered, an email will be created for that client.
If Mailers chkbox Ticked in 'By Email':	In the client record under the **'Marketing'** tab, if the **'Mailers'** check box is ticked in the **'Send By Email'** section, an email will be created for that client.
If Reminders chkbox Ticked in 'By Email':	In the client record under the **'Marketing'** tab, if the **'Reminders'** check box is ticked in the **'Send By Email'** section, an email will be created for that client.

Txt / SMS	
Don't Send Smss:	SMS's will not be generated for clients.
If Mobile Entered:	In the client record under the **'General'** tab, if a mobile number is entered, an SMS will be created for that client.
If Mailers chkbox Ticked in 'By SMS':	In the client record under the **'Marketing'** tab, if the **'Mailers'** check box is ticked in the **'Send By SMS'** section, an SMS will be created for that client.
If Reminders chkbox Ticked in 'By SMS':	In the client record under the **'Marketing'** tab, if the **'Reminders'** check box is ticked in the **'Send By Mail'** section, an SMS will be created for that client.

13. Click on the **'New'** button to create a new letter. You may do this for each type of communication you wish to use. e.g. a letter, email or SMS.

NOTE: In the **'Template to Use'** section you can also choose an existing template and you can then edit this template by clicking on the button on the same line.

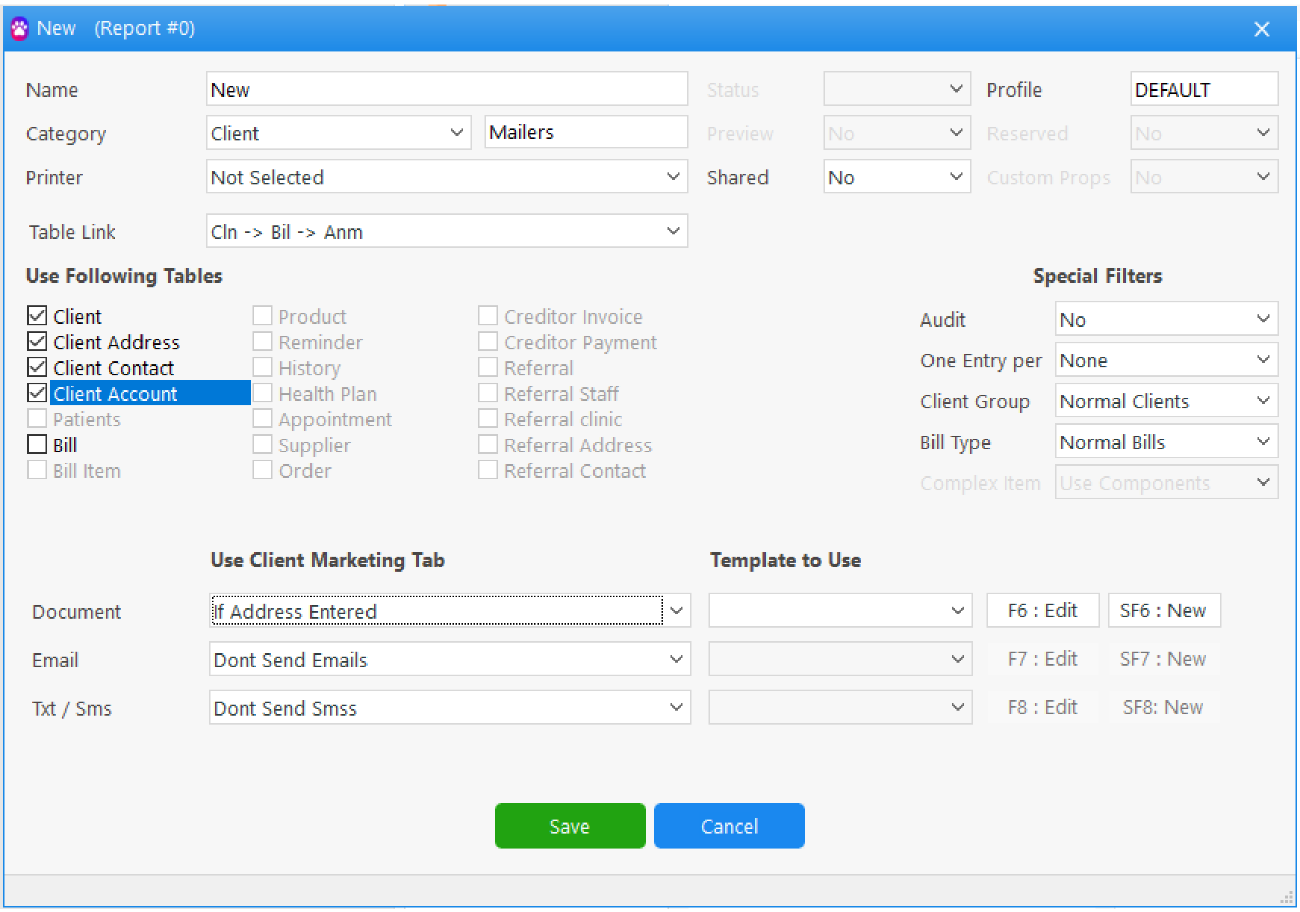
14. You will be prompted to enter a file name for your mailer document (usually the same as the name for the bulk mailer report you are creating), then click **'OK'.**

15. The word processor will open; enter the text for your mail merge document.

16. When you have finished, click the save button in the top left-hand corner to save the document, then click the cross in the top right-hand corner to close the window.

17. Now select the Save button from the bottom right-hand corner of the bulk mailers dialog box.

18. You have now completed setting up your bulk mailers.



Printing and Sending Mailmerged Documents

1. Click on the **'Reports'** button from the tool bar.

2. Double-click the **'Bulk Mailers'** button or the **'Reminders / Recalls'** button if you are sending reminders.

3. From the Bulk Mailers window, chose the category of the bulk mailer you wish to send.

4. Double click on the bulk mailer you wish to send, and the filter page will open.

5. Choose the filters that you want to limit the search by and click the **'Next'** button to start the search.

6. A list will be created with all the results matching the specified filters.

7. You can now finalise which clients are to receive the mailers and what form of communication is to be used. Use the **Inc, Post, Eml and SMS** boxes to do this.

Inc (Include):	When unchecked the client will not be sent any type of mailer even if the post, email or SMS boxes are ticked. When unchecked the client's details will change to italics.
Post:	If ticked a letter will be printed out for the client.
Eml:	If ticked the client will be sent an email.
Sms:	If ticked the client will be sent an SMS text message.

8. Once you have chosen who to send mailers to and how to send them, click on the **'Process'** button.

9. A copy of the unmerged document will now be shown. If required you can edit the document. If there are any SMS and email messages pending, these will be sent first, they **will not** be previewed.

10. Click on the **'Merge Preview'** button and the client's details will be merged into the document.

11. Click on the **'Print'** button and the letter will be printed.

EXPORTING DATA

Exporting from an Existing VetlinkPRO Document

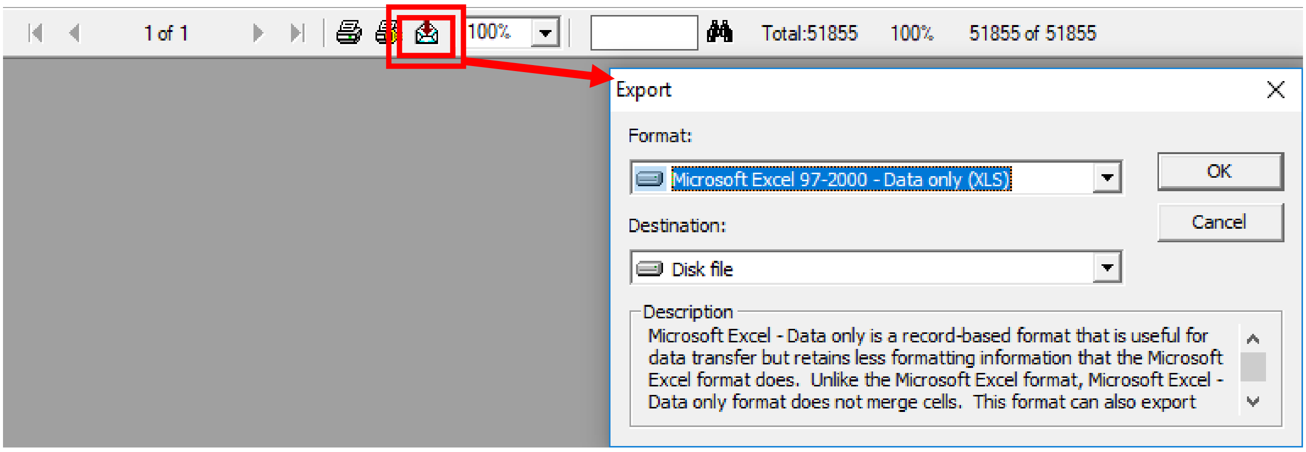
VetlinkPRO allows you to export any report out of the application to another format.

1. Create a report and preview it.
2. Click on the export button at the top of the preview screen.
3. Choose the format and the destination for the exported file.

NOTE: The formats shown in the **'Format'** menu will vary depending on what applications you have installed on your machine. For most users however, Excel or CSV should be used for documents you would like in spreadsheet form. For text documents you should use Word or RTF if available.

The **'Destination'** menu selects where you would like to export the document to. You will generally choose **'Disk File'** here and select a location on your hard drive to save the document, e.g. **'My Documents'**.

4. Depending on the **'Format'** and **'Destination'** you choose, in the previous step, you may be prompted with some windows asking how to save the document. These prompts will vary depending on what format or destination you have chosen.
5. Congratulations, you can now open the document to edit, print or email.



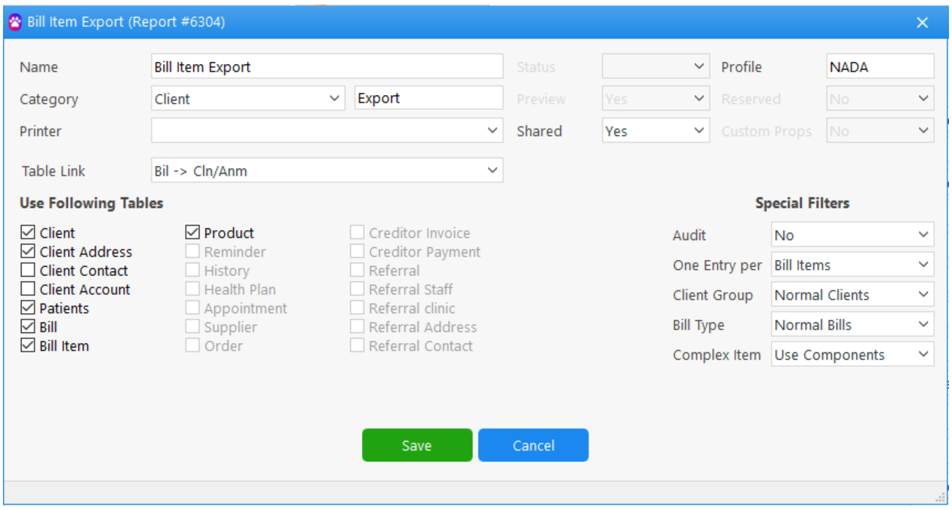
Exporting Data from VetlinkPRO to Excel

Creating an Export Template

1. Click on the **'Reports'** button and then on **'Export / Spreadsheets'**.
2. Click on the **'Add New'** button.
3. Click the **'Yes'** button to the **'Design New Report'** prompt.
4. Choose the settings for the report.
5. In the **'Name'** field enter a suitable report name.
6. In the **'Category'** field choose the category the new report will appear under in the export lists.
7. In the **'Table Link'** field select the table link that information should be retrieved from. (For simple client exports choose **'Cln -> Bil -> Anm'**)
8. In the **'Use Following Tables'** field select what tables you wish to search for data in. (For simple client exports just tick the first four client fields).
9. In the **'One Entry per…'** field select if you require one entry per item.

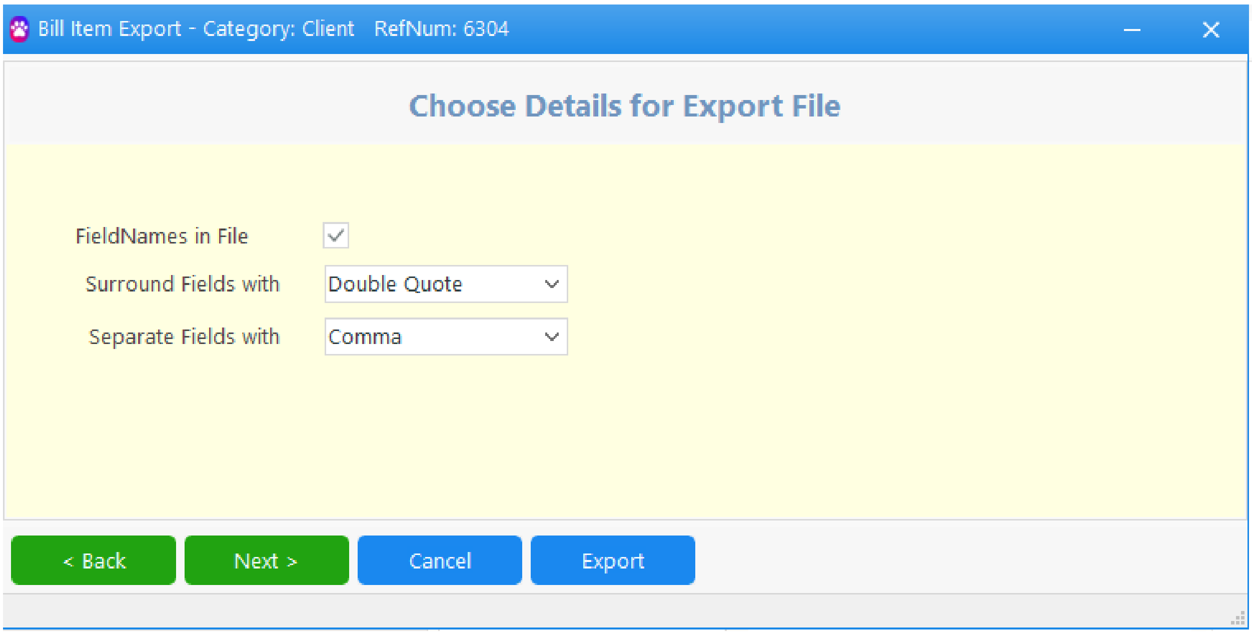
NOTE: If you have ticked the patient or billing tables and only want one record per client set this field to **'Client'**. If you have only ticked the client fields leave this set as **'None'**.

10. Save the new report by clicking on the tick in the bottom right-hand corner of the page and then clicking **'OK'** to the prompt.



Exporting Data Using the Export Template

1. Click on the **'Reports'** button.
2. Click on the **'Export / Spreadsheets'** button.
3. Double-click on the export template you wish to use.
4. The filter page will open. Choose the filters you wish to limit your search by.
5. Click **'Next'** and the **'Export Details'** page will open..
6. Ensure **'Field Names in File'** is ticked.
7. Set **'Surround Fields with'** to **'None'**.
8. Set **'Separate Fields with'** to **'Comma'**.
9. Select the **'Folder'** where you would like to save the file.
10. Choose a suitable **'Filename'** for the export file.
11. Click on the **'Export'** button.
12. Congratulations you have exported a file. You can now open this file in **'Excel'** or **'Notepad'** if you wish to manipulate the data further.



EMAIL CAMPAIGNS VIA MAILCHIMP

VETLINKPRO now integrates with MailChimp. MailChimp is one of the leading online marketing email solutions that allows you to send graphical emails and targeted campaigns to your client base. MailChimp has many features to help manage your email campaigns including:

- An easy-to-use Email designer (including templates).
- Advanced Analytics including open rates and click rates.
- Automatic Unsubscribe which also updates your VETLINKPRO database.

You can create a free account in MailChimp that allows you to send 12000 emails to 2000 subscribers for free per month. You can also purchase a paid account that allows you to send an unlimited number of emails per month. These are all explained under the Pricing link on the MailChimp website.

Configuration of VETLINKPRO and MailChimp

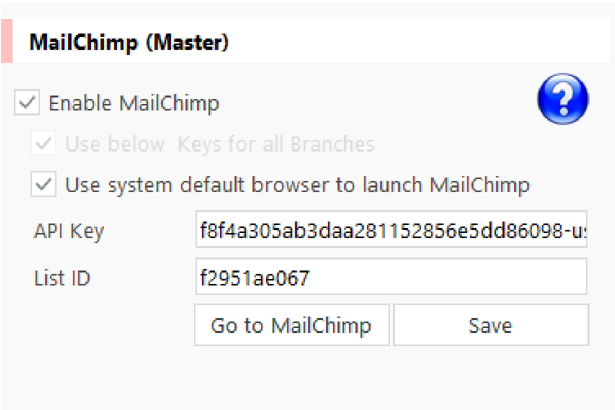
1. Enable MailChimp by going into **Options | Setup | Misc | 9: Internet Cont.**

2. Tick **Enable MailChimp** and **Use system default browser to Launch Mail Chimp.**

3. Enter **API Key** from MailChimp website.
    i. Login or Create a MailChimp account.
    ii. Go to **Profile | Account | Extras | API Key | Create a Key.**

4. Enter **List ID / Audience ID** from the MailChimp website.
    i. Login or Create a MailChimp account.
    ii. Go to **Audience | Manage Audience | Settings | Audience Name and Defaults | copy Audience ID.**

5. Exit Setup and save changes.



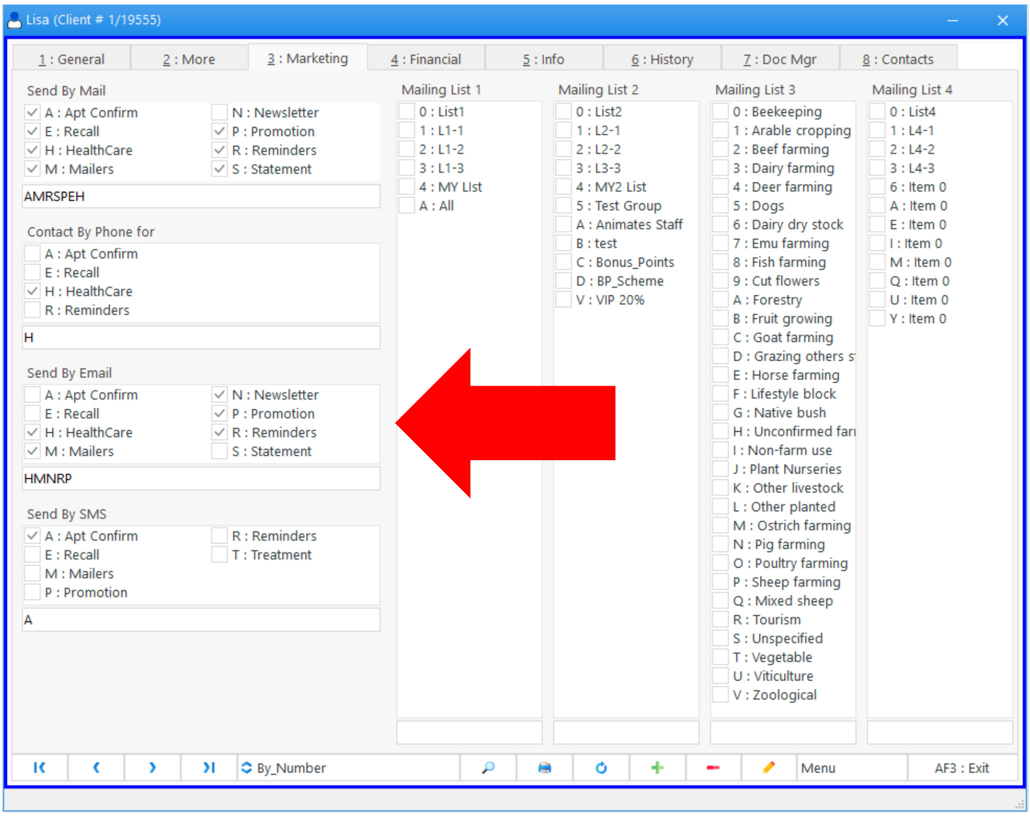
Note: You can create a sign-up form on MailChimp and link it to your website. Clients who sign up through this form WILL NOT be imported into VetlinkPRO. Campaigns created from VetlinkPRO and exported to MailChimp will not include these clients by default either.

Client Record Setup

Integration with MailChimp can be used in conjunction with the **Mailers, Newsletters** and **Promotions** lists set in the Marketing tab of the client record. Clients can subscribe to All or either of the lists. When an email campaign is sent you can then choose to send the campaign only to members that belong to one of the lists. This is great because when a client unsubscribes from a list, e.g. Promotion, they are only unsubscribed from that list. That means they will stay on other lists so they can still get important emails like Vaccination Reminders.

Emails sent from MailChimp will also automatically include a link to **Update your Subscription Preferences**. Clients can then choose what Lists they wish to belong to which will automatically update their preferences in VetlinkPRO as well. An entry in the client document manager will document any list changes that have been done by clients.

To assign / un-assign clients to these lists go to the client record and look under the marketing tab then under **Send By Email** tick the list the client wants to be a part of. It is also recommended that you set up your **Client Profiles** to have these lists ticked so when a new client is created they are ticked automatically.



Best Practice

To begin with VetlinkPRO recommends ticking the **Send By** Flags for ALL clients as well as updating your Client Profiles so new clients are also entered correctly. Client are then un-ticked as they unsubscribe. Please contact VetlinkPRO if you would like a script to be run to update all clients.

How to Setup a New Email Campaign

1. Before exporting your client list from VetlinkPRO you can set up your email template in MailChimp first. This way it is ready to go when you need it. Just log into your MailChimp account to do this.

2. Open VetlinkPRO and click on the **Reports** button.

3. Double-click on either the **Bulk Mailers**, **Newsletter** or **Promotion** button.

    a. The difference between each option is what list can be checked in the **Client Record** under the **Marketing tab** for **Send By Email**. **Note:** Even once you have selected the campaign type you still must specify in the Properties of the campaign that you wish to use this variable otherwise it will send to everyone with an email address.
    b. Bulk Mailers uses the Mailers flag, Newsletters uses the Newsletters flag and Promotions uses the Promotions flag.

4. The report properties window will open.

5. Next click on the **Add New** button and then click **Yes** to the **Design New Report** prompt.

6. In the **Name** field enter the name for the email, e.g. Dental Month.

7. From the **Category** drop down list select what category the bulk mailer will appear.

8. From the **Printer** drop down list, choose the printer that this document will print if it is a letter.

9. From the table link drop down menu choose which table link you wish to use for this document. For simple client lists select **Cln -> Bil -> Anm**.

10. Depending on the link you select you can then choose the tables to get information from in the **Use Following Tables** section.

11. Choose any special filters that you may wish to use. For example, if you have ticked the patient or billing boxes in **Use following tables** and you only want to send one bulk mailer per client, select **One per client** from the drop-down list.

12. Under the **Use Client Marketing Tab** section for Email, select which clients to send emails to by clicking on the drop-down list. This section uses the information set up in the client record.

Email	
Don't Send Emails:	Emails will not be generated for clients.
If Email Entered:	In the client record under the general tab, if an email address is entered, an email will be created for that client.
BEST PRACTICE: If Mailers / Newsletters / Promotions chkbox Ticked in 'By Email':	In the client record under the **Marketing** tab, if the **Mailers / Newsletters / Promotions** check box is ticked in the **Send By Email** section, an email will be created for that client.

13. If you wish you can also configure the campaign to send Letters or SMS as well. Note the letters and SMS are generated / sent as normal from VetlinkPRO. Please refer to the bulk mailers section of the manual for more information on doing this.

14. You must still select a template in the "Template To Use" box for any MailChimp destined campaigns. The Vetlink template won't be used but is required to enable finding clients with email addresses. It is suggested you create a blank email template for this purpose entitled "MailChimp Campaigns".

15. Now select the Exit button from the bottom right-hand corner of the bulk mailers dialog box.

16. You have now completed setting up your bulk mailers.

Sending an Email Campaign via MailChimp

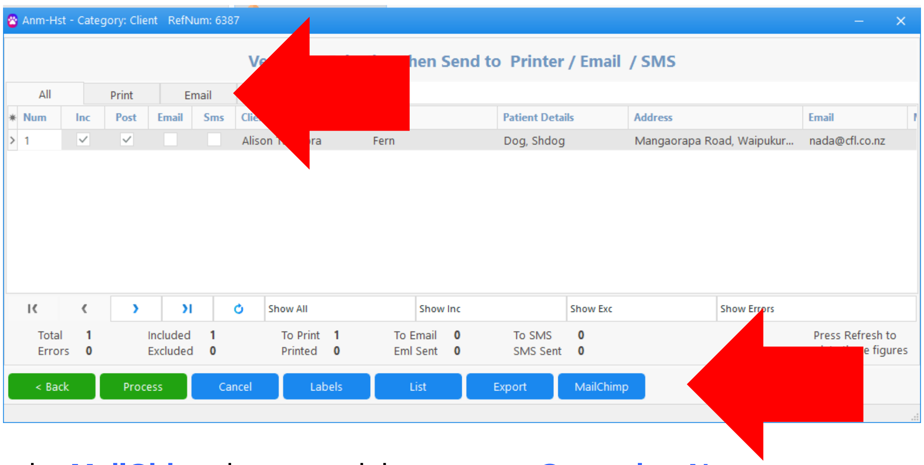
1. Go to **Reports | Bulk Mailers | Select Mailer to send**.

2. Set the filters you wish to use then click **Next.**

3. Amend the list of clients you wish to send the email campaign to by un-ticking or ticking clients.

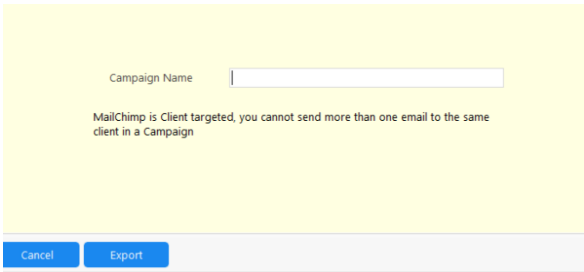
4. Once the list has been amended click the **Email** tab.

5. A **MailChimp** button will now become available.



6. Click on the **MailChimp** button and then enter a **Campaign Name.**

7. Click on **Export.**



8. You will be prompted with a message stating **"Clients might have opted out from receiving Mailers. Your selection will override clients' preference. Do you want to continue?".**

9. Select **Yes** to continue and start the export.

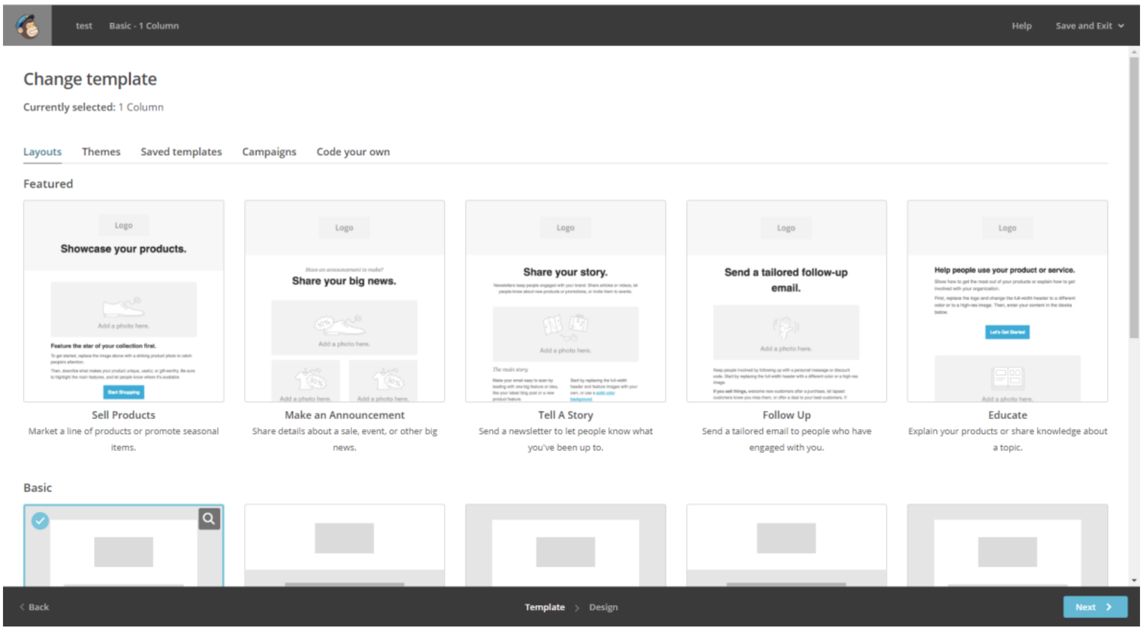
10. If Mailchimp finds any invalid emails in the list you are sending the export will stop. A prompt will appear asking if you wish to exclude the invalid emails and continue or get a list of the invalid emails to fix in VetlinkPRO first and then resend.

11. Give VetlinkPRO some time to export, and after a while it will prompt another message stating **"Your Campaign "Campaign Name" is created in MailChimp. Please review the Email design/template before sending it".**

12. After accepting the prompt, your default browser should pop up with the MailChimp login screen.

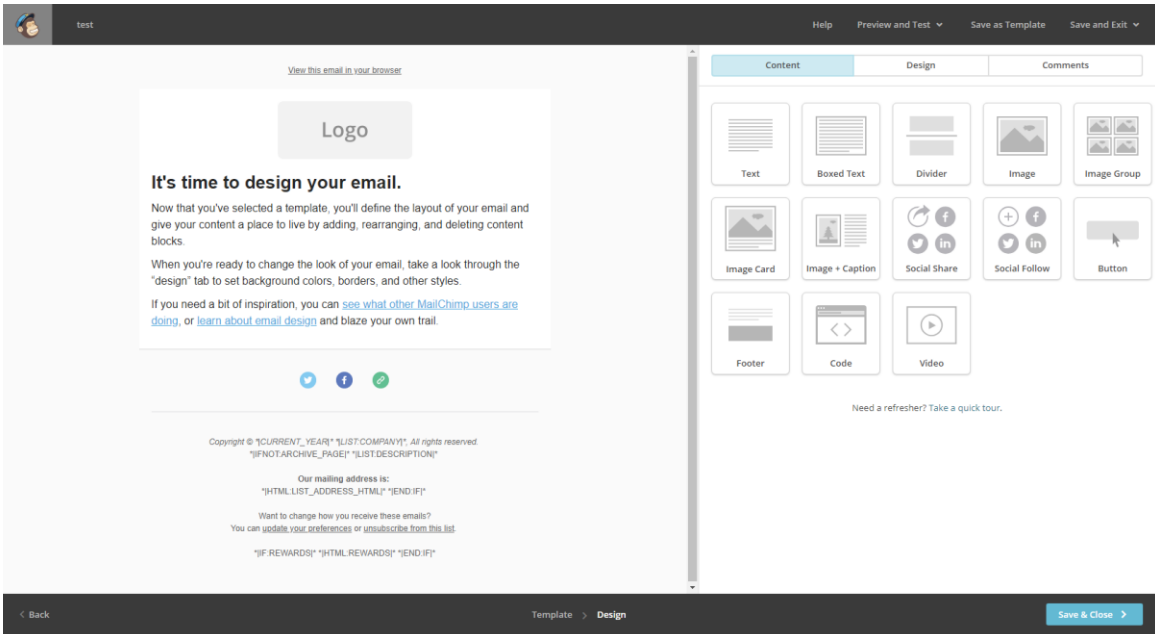
13. Log in and it will take you straight to the **Campaign Setup Wizard**.

14. Choose the template you would like to work with by clicking on one of the options in the **Layouts** or **Themes** tabs.
    - You can choose from a **Saved** template (e.g. one your created earlier), **Featured** template, **Basic** template, **Themed** template, or **Code Your Own** using HTML.
    - The **Saved Templates** option shows you all of your previously saved custom templates that you have created using the **Code Your Own** option.
    - The **Campaigns** option shows you a list of previously sent templates used in a campaign.



15. Using the Email designer you can now insert the text and images for your template. Depending on your selection in the previous step the amount of work you need to do may vary.

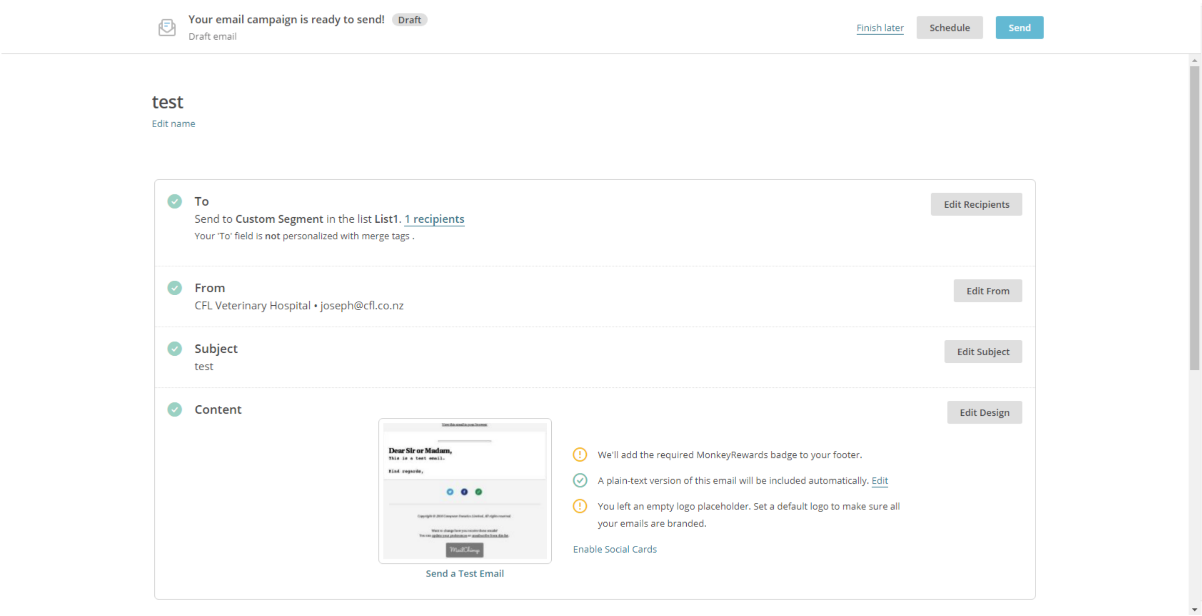
16. If you selected one of the **Basic** or **Themed** templates, then all you need to do is either use the content boxes and drag them to its place holder or edit existing content boxes on the email.



17. Once you have finished creating your email click **Save & Close** to continue.

18. This is the final stage of the journey before you send it away. On this screen you can:

- Edit your Recipients, who they'll be receiving it from, the Subject Line, and the design of the email.
- Set up a schedule for the delivery of emails so that they send at a specific time and date.

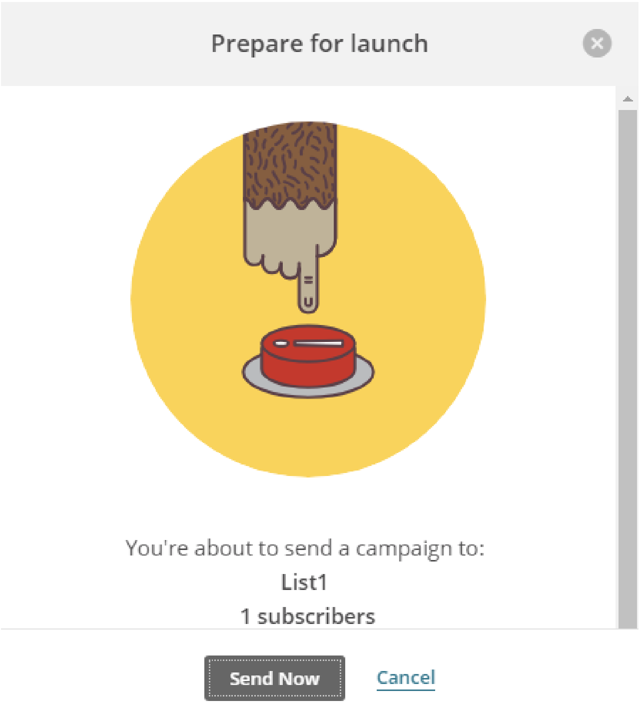


19. Once all that is checked and is ready to go, click on the **Send** button.

- Note by Default this will just send to the segment exported from VetlinkPRO. You can however click the edit button for the list and choose to send to the whole list. This will then include clients who have just registered on MailChimp as well as the VetlinkPRO clients.

20. A **Prepare for Launch** window will pop up.

21. Click **Send Now** and you're finished.

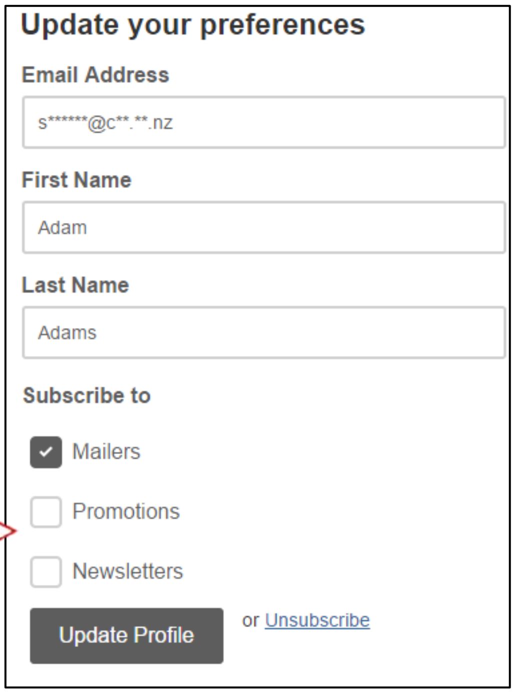


Un-Subscription

All emails sent out through MailChimp automatically have **Unsubscribe from This List** and an **Update Subscription Preferences** links included in the email.

- **Unsubscribe From this List:** From this link the client will be unsubscribed from all lists in MailChimp as well as the Mailer, Promotion and Newsletter lists in VetlinkPRO.
- **Update Subscription Preferences:** From this link users can update their email address, name and lists they are subscribed to which will then automatically update the list preferences in VETLINKPRO as well.
- Please note that both links only remove clients from the selected lists and does not remove their email address. Therefore if you do not send emails by subscription list the client will still get the email. Also the lists the client can unsubscribe from does not include the Reminder list, so even if the un-tick each list they will still get reminder emails.
- Any un-subscription will be recorded as an entry in the client's document manager, so it is documented why they are not on a particular list.

Best Practice: As MailChimp adds in the Unsubscribe links automatically to your email, you may want to add a description to the bottom of your email describing what each link does. This way you can advise clients to use the Update Subscription Preferences link, so they don't unsubscribe from all lists.



Campaign Analysis

Unlike print and traditional direct marketing, email marketing allows you to track how many people opened your email campaigns and see exactly what they clicked. Check out the MailChimp website for instructions on how to do this.