

One Stop Marketing for Actinic

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Introduction

With One Stop Marketing for Actinic you can extract your customer details from your Actinic database. The extracted details can then be imported into a variety of packages (see the **Importing User Details** section for how to do this) or printed onto labels or envelopes. Any duplicate customer names are removed before creating the list.

See the **Selection Details** section to show how to get specific customer information based on your orders.

Selection Details

One Stop Marketing for Actinic V7 (Site1)

Order Details | Options | Preview

Main | Select Products | Product Search | Location Search

Dates:

Order Placed Order Completed Order Received

From: 01 March 2006 00:00:00

To: 02 March 2006 00:00:00

Payment Status:

Order Payment Status: Full Payment Received

Order Status:

Any

Complete

Pending

Partly Shipped

Fully Shipped

(AND) Purged

Include Address Details From:

Invoice Address Delivery Address Only when different to Invoice Address

Only Include Orders From Registered Customers

Filter On 'Keep Details Private':

Ignore this setting

Include when ticked

Include when not ticked

Filter On User Defined Fields:

User definable 1 Value:

User definable 2 Value: yes

User definable 3 Value: yes

Filename: c:\output\File1.csv

Format: Microsoft Format (Outlook, Outlook Express, Word et...)

By default all customer invoice addresses for today's complete orders are collected. Each of these parameters can be changed.

Dates

The date to select orders from can either be the *Order Placed* date, *Order Completed* or *Order Received* date. The *Order Received* date should be selected if One Stop Marketing is used in conjunction with One Stop Automation (to export customer information as an order is downloaded).

The date range can either be a specific date range or up to or from a certain date. To select up to a certain date un-tick the *From* field and enter a date in the *To* field. To collect information from a certain date un-tick the *To* field and enter a date in the *From* field..

Order Status

If you are interested in certain customers based upon their order status, for example, if their order is still pending and hasn't been shipped for 2 weeks, you can select which order status' you are interested in.

Payment Status

You can select the customer details from the orders with a certain payment status. For example, you may want to email customers who have made an *Excess Payment*.

Include Address Details From

You can select which address to collect from the order for each customer. This can either be the *Invoice Address* or *Delivery Address*. If you are using the *Delivery Address* you can choose to only use it if it is different from the *Invoice address* by ticking the *Only when different to the Invoice Address* option.

If you only want to extract your registered customers tick the *Only Include Orders From Registered Customers*.

Export Customers Accounts

To export Customers and Buyer accounts click on this option. This is only available in the Advanced version. For more information see the **Export Customer Accounts**

Filter on 'Keep Details Private'

You can choose to only include people who have requested such as option (in replying to the default question, *Occasionally we share our address list with other businesses so they can contact you regarding outstanding offers that they may have. Check here if you want us to keep your contact information private and do not wish to receive these offers*). Depending on how you have phrased your question you can choose to include customers by either having this option ticked or unticked, by using the *Include when ticked* or *Include when not ticked* option.

Filter on User Defined Fields

You can also set-up additional fields to see if people want to be in your marketing campaign. If you have use the *How did you find our site?*, *What was your reason for buying* or *User Definable 3* fields (*User Definable 1*, *User Definable 2* or *User Definable 3* in the *General Information* tab, under *Web site (cont)* in *Design Text* in Actinic) fields you can also filter on specific values (case insensitive).

Format

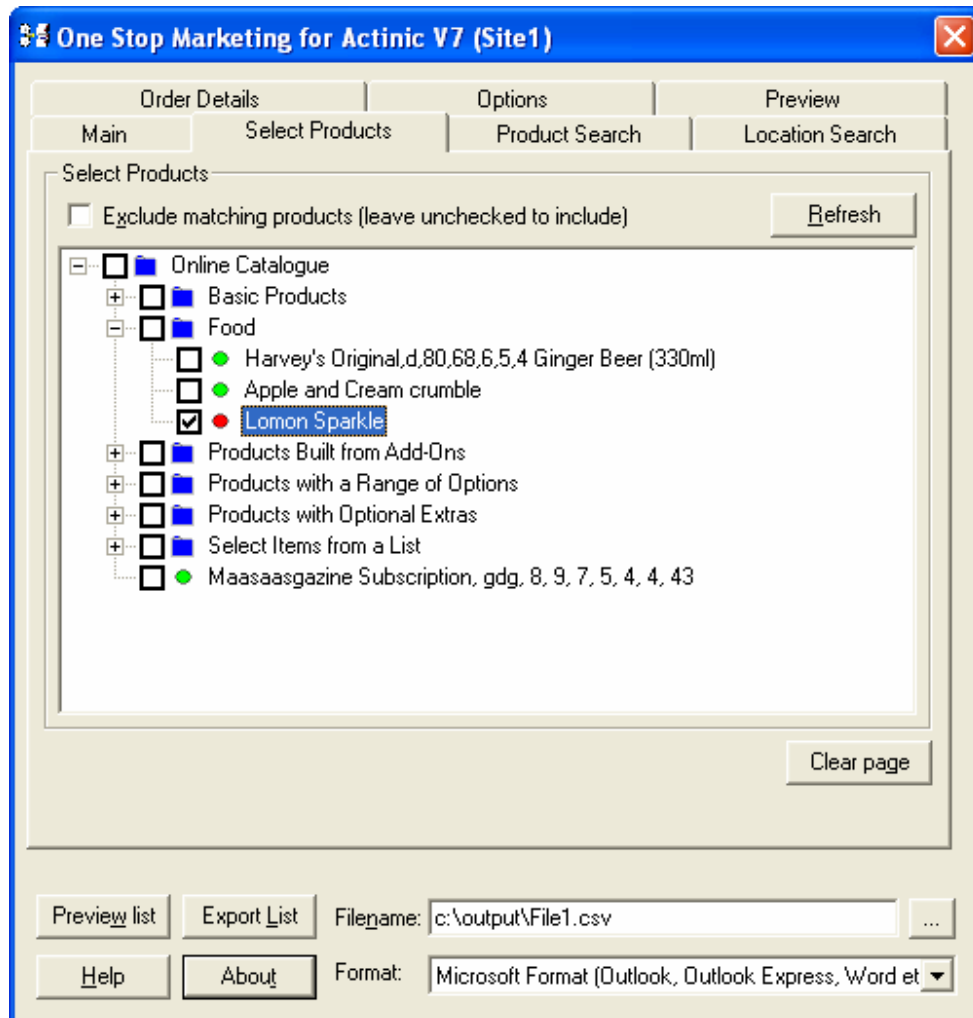
The CSV file can be exported in 2 formats. *Standard* or *Microsoft Format*. The *Microsoft Format* file uses a naming convention for the fields that matches the Microsoft Office standard. The *Standard Format* can be used to import into Group Mail or another product that supports CSV import.

Once you have specified the orders to search, enter a filename to export to. You can either preview the customers or export the information to the file. If required, once the information has been shown in the preview window you can then export the information

Advanced Filtering

If you have a One Stop Marketing Advanced license you can use advanced filtering. This provides you with additional filtering to search for customers within certain locations and who purchased certain products.

Select Products



To find all customers that purchased certain products simply select them from the Catalogue tree. If you want to find who hasn't bought a certain product use the *Exclude matching products* option. To clear all the selections use the *Clear page* button.

Products Search

One Stop Marketing for Actinic V7 (Site1)

Order Details | Options | Preview

Main | Select Products | **Product Search** | Location Search

Product Lookup

Exclude matching products (leave unchecked to include)

Search by

Reference Name

Name:

TEA Contains

Clear page

Preview list | Export List | Filename: c:\output\File1.csv

Help | About | Format: Microsoft Format (Outlook, Outlook Express, Word et

You can also select products by name or product reference. This can be useful if the product you are looking for is no longer in your Catalogue. If you want to find who hasn't bought a certain product use the *Exclude matching products* option. To clear all the selections use the *Clear page* button.

Location Search

One Stop Marketing for Actinic V7 (Site1)

Order Details | Options | Preview

Main | Select Products | Product Search | Location Search

Product Lookup

Exclude matching locations (leave unchecked to include)

Search By

Postcode Country

Address Line 3 (Town) Address Line 4 (County)

Postcode:

Clear page

Preview list Export List Filename: ...

Help About Format:

You can find who has purchased items from your shop by their location. This can be any part of the address. You can also search for customers using partial information. For example, using a postcode starting with of BD to find all the customers in the Bradford area. If you want to find who doesn't live in a certain location use the *Exclude matching locations* option. To clear all the selections use the *Clear page* button.

Order Details

One Stop Marketing for Actinic V7 (Site1)

Main | Select Products | Product Search | Location Search

Order Details | Options | Preview

Orders Placed

Shoppers that have placed less than 3 Order(s)

Order Value

Do not check the value of orders placed 0

Include Tax in Order Value Include Shipping and Handling in Order Value

Clear page

Preview list | Export List | Filename: c:\output\File1.csv

Help | About | Format: Microsoft Format (Outlook, Outlook Express, Word et

You can target specific details relating to the orders placed. There are 2 categories.

Orders Placed

For all of the available options (shown below) you can select the number of orders.

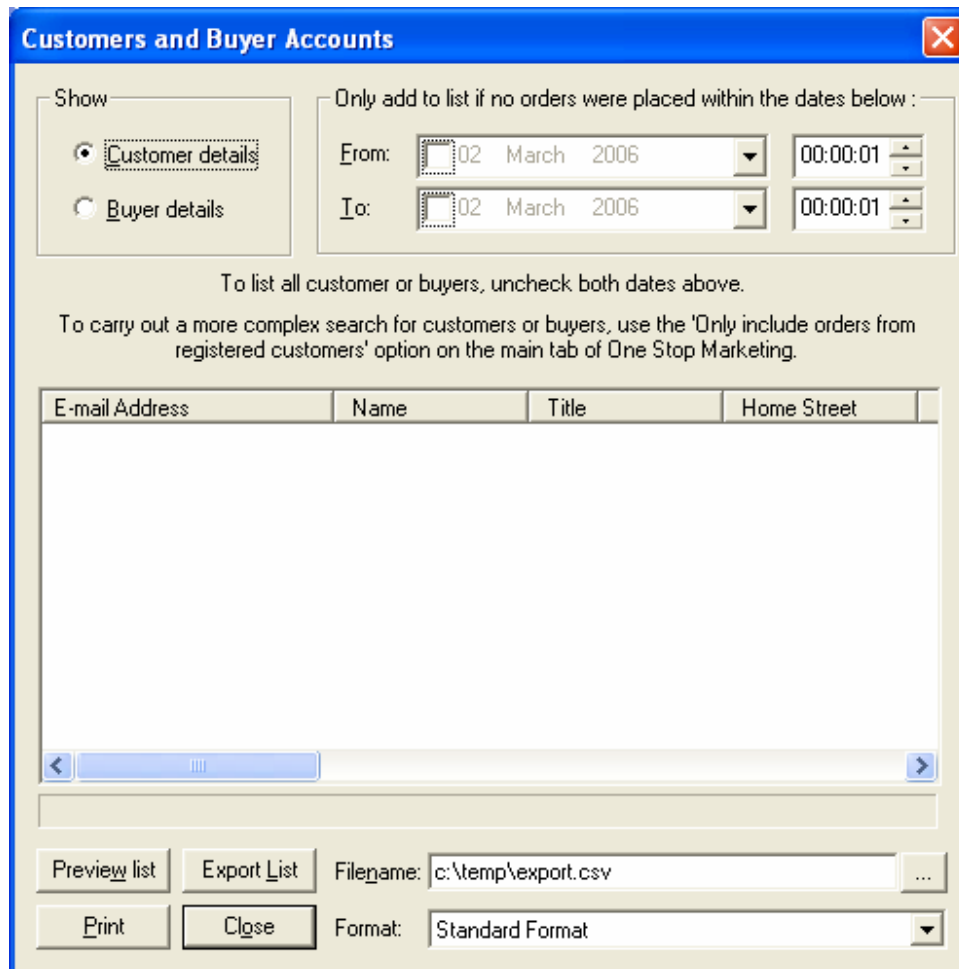
Shoppers that have placed less than
Shoppers that have placed exactly
Shoppers that have placed at least
Shoppers that have placed less than

Order Value

For all of the available options you can select the orders value. You can choose whether to include the orders tax and/or shipping and handling costs in your orders value.

Exporting Customer Accounts

Customer accounts are set-up in Actinic to allow different customers to have different prices or to access areas of your website general users can not. It is also useful to target these customers as you already probably know them. To extract customer account information they do not necessarily have to of bought anything from your website.



Customers and Buyer Accounts

Show

Customer details

Buyer details

Only add to list if no orders were placed within the dates below :

From: 02 March 2006 00:00:01

To: 02 March 2006 00:00:01

To list all customer or buyers, uncheck both dates above.

To carry out a more complex search for customers or buyers, use the 'Only include orders from registered customers' option on the main tab of One Stop Marketing.

E-mail Address	Name	Title	Home Street
----------------	------	-------	-------------

Preview list Export List Filename: c:\temp\export.csv ...

Print Close Format: Standard Format

Show

You can select to retrieve customer or buyer account details

Only add to list if no orders were placed within the dates below :

If you want to select all the customer account details untick the *From* and *To* fields. If you want to select customer accounts that did not place orders between certain dates tick the *From* and/or *To* box and enter the required date(s).

You can *Preview list*, *Export List* and *Print* in the same way as you do in the main order selection dialogs.

Options

One Stop Marketing for Actinic V7 (Site1)

Main | Select Products | Product Search | Location Search

Order Details | Options | Preview

Export File Details:

Name:

Include time and date

Include Actinic site name

Creation:

Overwrite existing list

Add to end of existing list

File Header:

Include field names as the first line of the export file

Unique Field:

Email Address PostCode Name Order Number

Use Email Address but use Postcode if Email is blank or set to a dummy value

Use Email Address but use Order Number if Email is blank or set to a dummy value

Dummy Value(s) orders@osf.biz

order@osf.biz odres@osf.biz

Only include orders where the email is blank or set to a dummy value

Preview list Export List Filename: c:\output\File1.csv ...

Help About Format: Microsoft Format (Outlook, Outlook Express, Word et ...)

Export File Details

When the customer details are exported to a file you can choose to add additional information to the filename. This can include the time and date and the name of your Actinic site. The name of the site can be useful if One Stop Marketing is used in conjunction with One Stop Automation with the multi-site option (so that you can see where the customer information was exported from).

You can also choose to overwrite the exported file each time or add customer details to the end of the file.

File Header

When the file is exported you can also choose to include the field names as the first line in the file. This may be a requirement for the package that the names and addresses are being imported into.

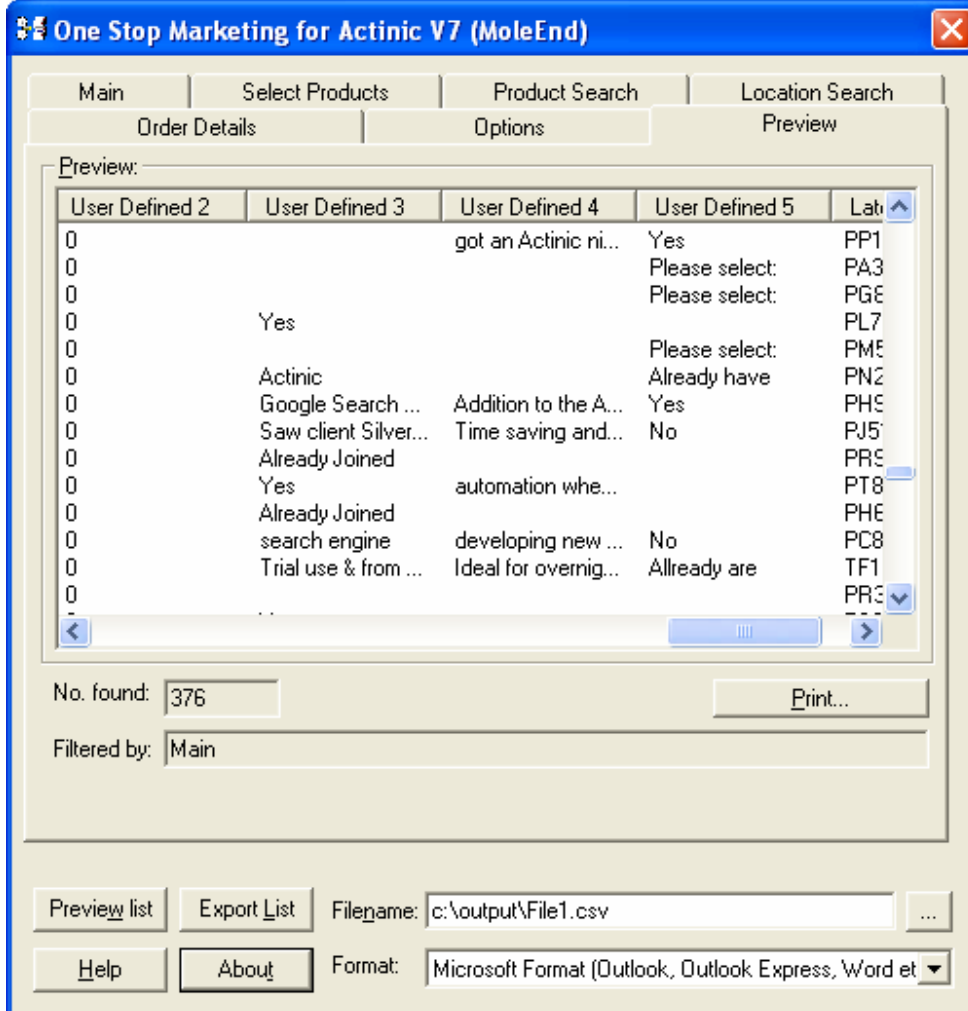
Unique Field

The Advanced Version of One Stop Marketing allows you to identify customers by different information. This is useful if you don't use email addresses to identify your customers, for example, if you use Actinic as a telephone ordering system. If you are using One Stop Marketing to print labels (or envelopes) the email address may not be appropriate and you only want to send one mailshot to each customer name.

Some customers may not specify an email address and you can choose to use a different field if the email address is blank or set to a value specific to your business. You can specify up to 3 dummy values incase the dummy value entered was manually entered in different ways.

Customer Details Preview and Printing

To see a preview of the list of the list of email addresses press the *Preview list* button.



Printing

If you are using the Advanced Version you can print the names and addresses shown by clicking the *Print...* button.

The screenshot shows a 'Printing' dialog box with the following options:

- Type:** Label Sheets, Envelopes, Report
- Labels:** 8 per Sheet, 16 per Sheet
- Envelopes:** C4, C5, C6
- Address Format:** UK, US
- Printer Settings:** Use Default Printer and Settings (text box), Select, Default
- Campaign ID/Message (NB: Will be printed):** (empty text box)

Buttons at the bottom: Close, Preview, Print

You can print onto Label sheets, envelopes or produce a report.

Labels

You can print onto standard Avery label sheets.

62 series - 16 labels per sheet (8 by 2) L7162, L7562, J8162, J8362, J8562
65 series - 8 labels per sheet (4 by 2) L7165, L7565, L7765, J8165, J8365, J8565

Envelopes

You can print onto standard envelopes.

C4 – An A4 sheet can be placed unfolded into the envelope.
C5 – An A4 sheet can be placed folded in half or an A5 sheet can be unfolded into the envelope.
C6 – An A4 sheet can be placed folded into quarters or an A5 sheet can be folded in half into the envelope.

Report

A report can be printed providing all the details of customers previewed.

A specific printer can be specified to print to. This can be useful so that, if printing to labels or envelopes, you don't have to keep changing the paper.

Each label or envelope can have an ID added printed. This can be used to track the source any responses or provide additional customer information.

Automating One Stop Marketing

You can run One Stop Marketing in batch mode. This allows you to automatically extract customer details from Actinic order information. The command line options available are :

-B Run in Batch mode. The current settings are used to automatically export the customer details.

-F <date> From date. The date is in the form "Year/Month/Day Hour:Minutes". For example "2003/10/27 23:10"

-T <date> To date. The date is in the form "Year/Month/Day Hour:Minutes". For example "2003/10/29 23:10"

The following options are advanced options:

-W <window> Window handle for outputting messages to. This is the numeric window handle of the window (i.e. the m_Wnd or HWND value).

-X If the details are to be exported you can specify this option. It uses the previously set-up options.

-I <indent> How far across to indent text that is displayed in the window. Each time a sub-operation is done it is indented. This will contain the current depth of processes being run.

How to automate One Stop Marketing using One Stop Automation

Setting Up One Stop Automation to automatically export email addresses using One Stop Email Marketing Advanced version

To automatically collect email addresses as orders are processed you should use the following steps.

1. Run One Stop Automation and press the options button.

2. Amend the default task or create a new one to have the following definition.

Task to run

Tasks to run:

Download Order Processing Upload

Order Processing:

One Stop Batch Order Processing

Other Order Processing and Actinic Export

Options: C:\Program Files\MoleEnd\1StopEmail\V7\ME_1Sto

Email results from run:

Email Results to: []

Setup Email

When to run:

Scheduled intervals

Selected time Start time: 00:00

Days:

Mon Tue Wed Thu

Fri Sat Sun

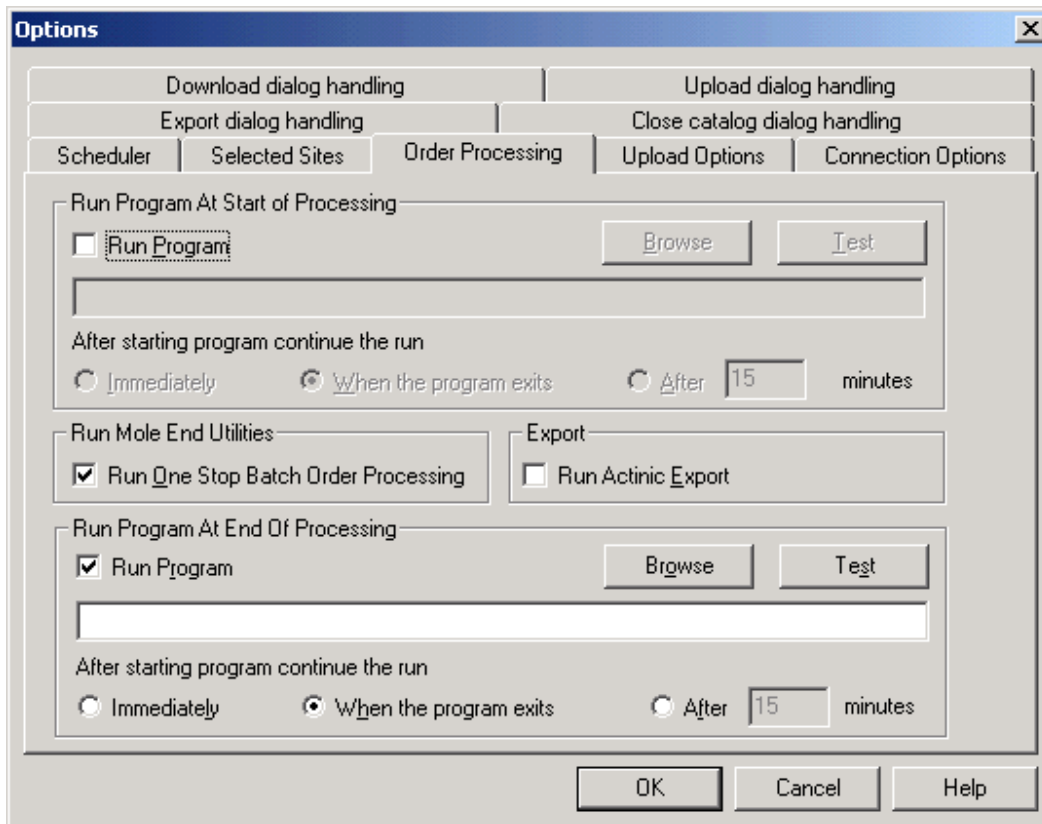
OK Cancel

NOTE: Select the following text to paste into your options field:

C:\Program Files\MoleEnd\1StopEmail\V7\ME_1StopEmail.exe -B -X -T "<To>" -F "<From>" <Window>

If you are using Actinic V4, V5 or V6 replace V7 with the appropriate version (for example, for Actinic V5 use V5).

3. Set-up the Order Processing options as shown below:



4. Close the One Stop Automation options.

5. Run One Stop Marketing and set the options as shown below:

Note: *Filter on user defined fields* has been used to only add people to the mailing list who type in yes at the checkout. This website uses the user definable 2 field for this question.

6. Select the Options tab and set the options as shown below:

The screenshot shows the 'Options' tab of the 'One Stop Marketing for Actinic V7 (MoleEnd)' application. The interface is divided into several sections:

- Export File Details:**
 - Name:** Include time and date; Include Actinic site name
 - Creation:** Overwrite existing list; Add to end of existing list
- File Header:** Include field names as the first line of the export file
- Unique Field:**
 - Email Address; PostCode; Name; Order Number
 - Use Email Address but use Postcode if Email is blank or set to a dummy value
 - Use Email Address but use Order Number if Email is blank or set to a dummy value
 - Dummy Value(s) [orders@osf.biz]
 - [order@osf.biz] [odres@osf.biz]
 - Only include orders where the email is blank or set to a dummy value

At the bottom, there are buttons for 'Preview list', 'Export List', 'Help', and 'About'. The 'Filename' field is set to 'c:\output\File1.csv' and the 'Format' dropdown is set to 'Microsoft Format (Outlook, Outlook Express, Word et...'.

The 2 important fields to set are the Creation (set to Add to end of existing list) and Unique field (set to Email address). The other choices will depend on your export format and whether you are using multiple Actinic sites.

7. Close One Stop Marketing.

Importing Customer Information

Descriptions of how to import into the following products are provided:

Group Mail

Microsoft Outlook

Microsoft Outlook Express

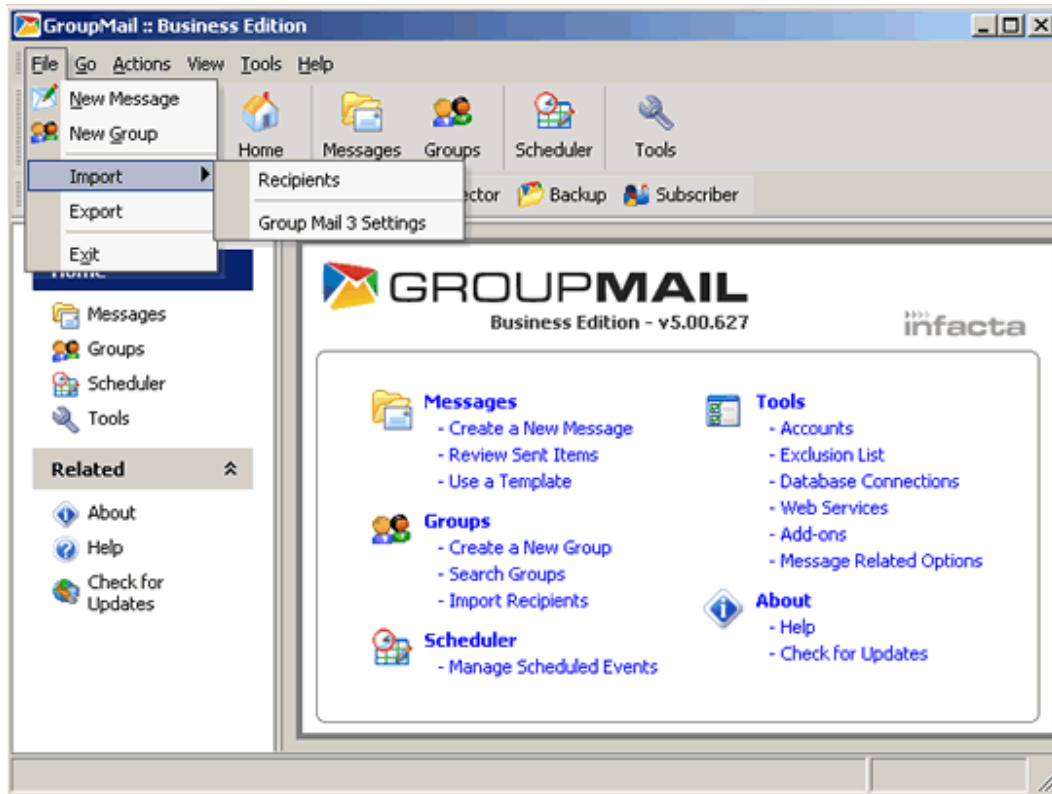
Microsoft Word

Microsoft Excel

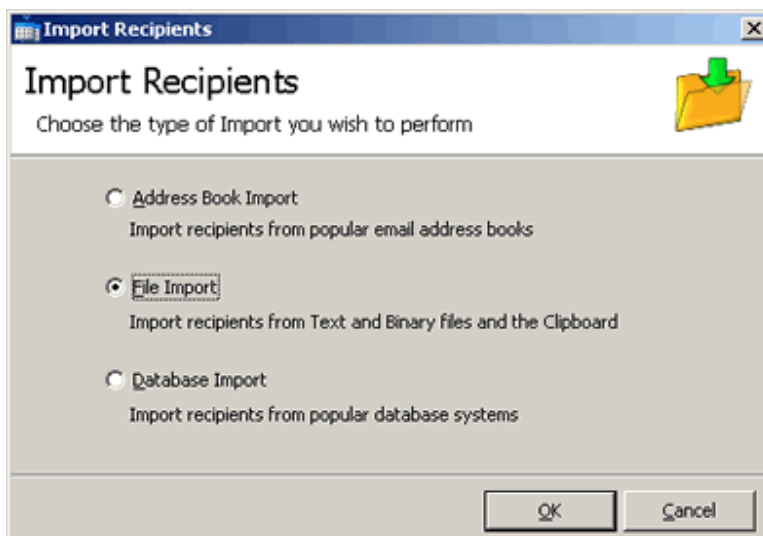
NOTE: To import into Group Mail you should select the *Standard Format* when exporting the customer information. When using Microsoft Office products (for example, Outlook) you should use the *Microsoft Format(Outlook, Outlook Express, Word)* format.

Importing into Group Mail

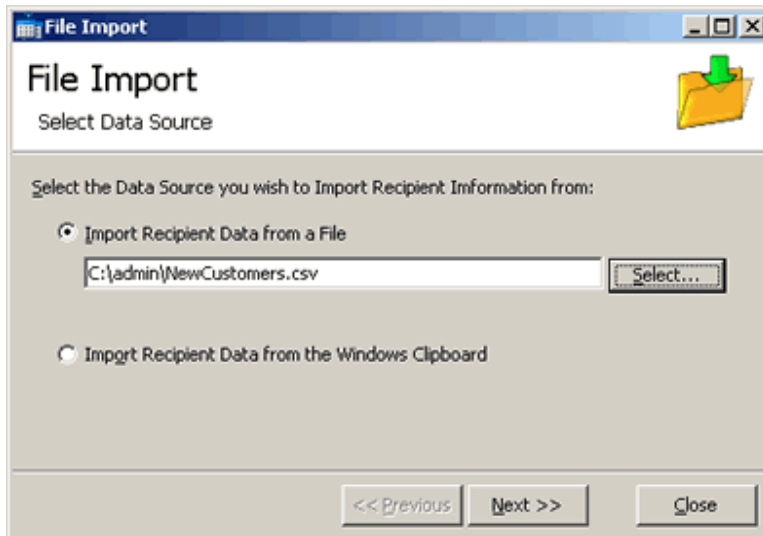
1. Run Group Mail and select the Import Recipients option



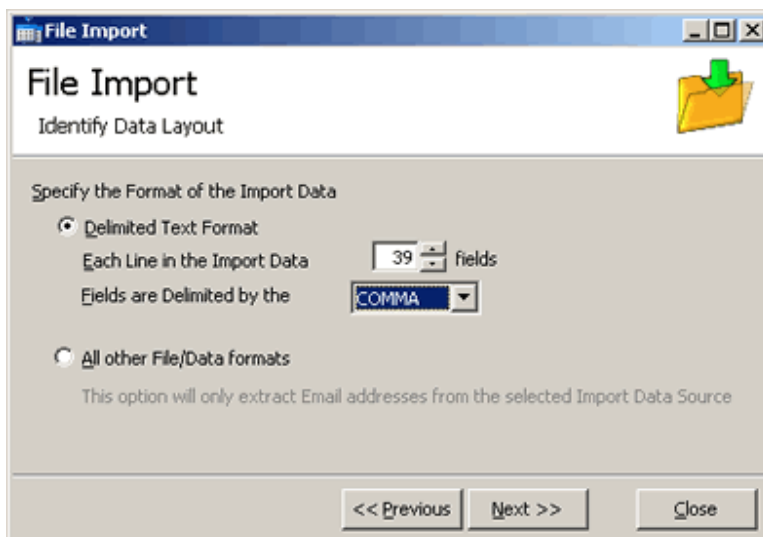
2. Select *File Import* and press *OK*.



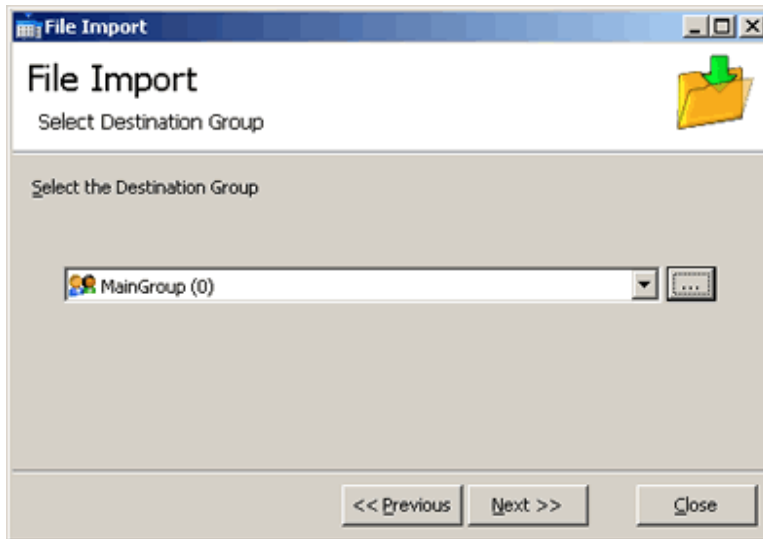
3. Select the file exported from One Stop Marketing and press *Next*.



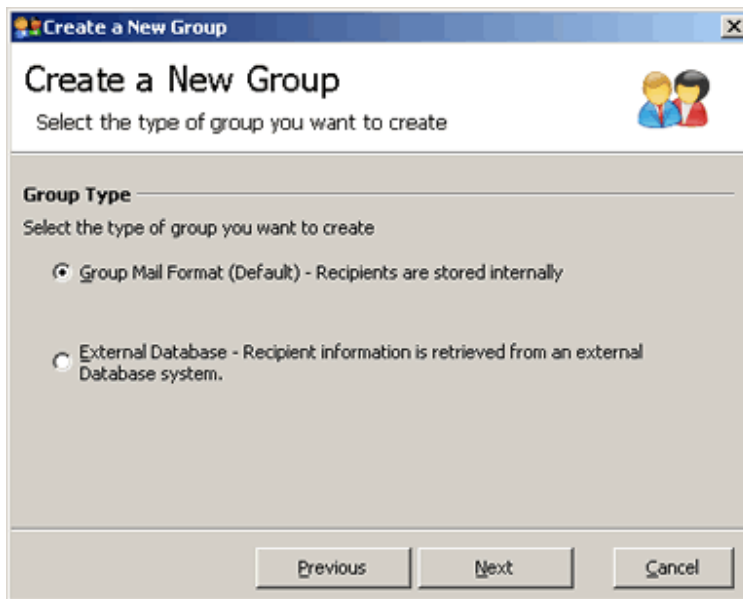
4. Change the import format to use *Delimited Text Format* with *Fields are Delimited by the COMMA* and press *Next*.



5. Select a previously created group or create a new one. If you have already created a group go to step 12. To create a group press the '...' button.



6. When creating a new group, unless you have additional requirements store your group within Groupmail. Select the default Mail format and press *Next*.

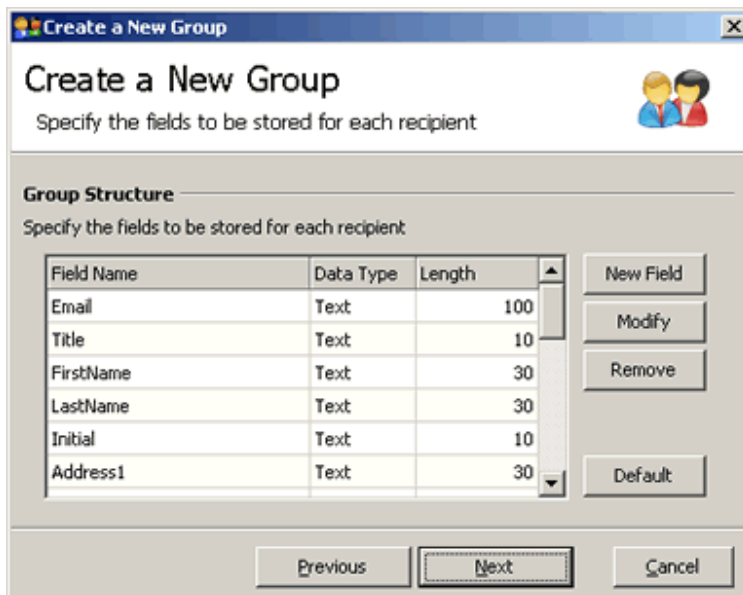


7. Select *Local* as your place to store the group and press *Next*.



The screenshot shows the 'Create a New Group' dialog box. The title bar reads 'Create a New Group'. The main heading is 'Create a New Group' with a sub-heading 'Select a location to store the new group'. Below this, the 'Group Location' section is active, with the instruction 'Select a location to store the new group'. There are three radio button options: 'Create a new group' (selected), 'Local (Default) - group is saved in the default Group Mail store', and 'Custom - Specify the location where the new group is to be saved.' The 'Custom' option has a text input field and a 'Select' button. At the bottom, there are 'Previous', 'Next', and 'Cancel' buttons.

8. Accept the default *Group Structure* and press *Next*.

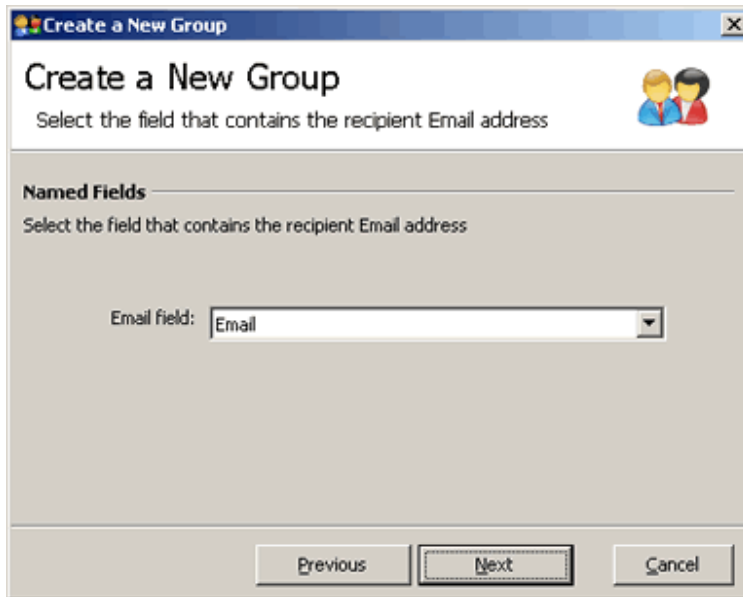


The screenshot shows the 'Create a New Group' dialog box. The title bar reads 'Create a New Group'. The main heading is 'Create a New Group' with a sub-heading 'Specify the fields to be stored for each recipient'. Below this, the 'Group Structure' section is active, with the instruction 'Specify the fields to be stored for each recipient'. A table lists the fields to be stored:

Field Name	Data Type	Length
Email	Text	100
Title	Text	10
FirstName	Text	30
LastName	Text	30
Initial	Text	10
Address1	Text	30

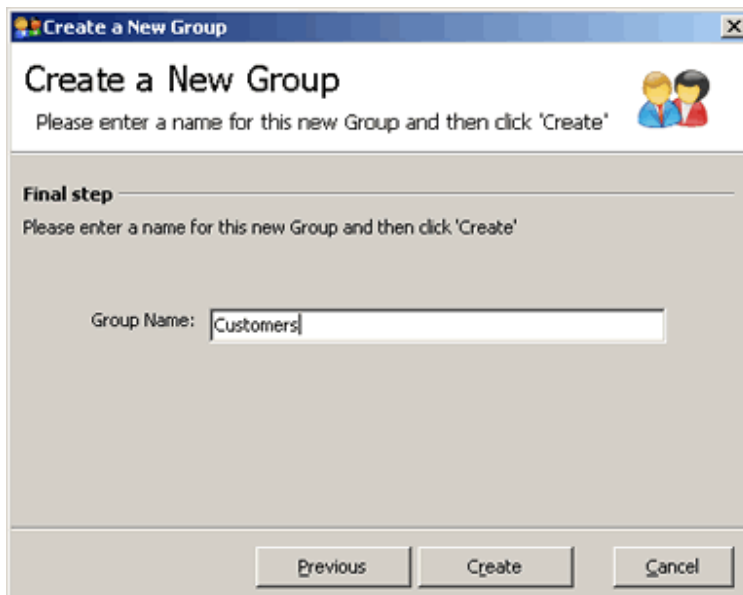
To the right of the table are buttons for 'New Field', 'Modify', 'Remove', and 'Default'. At the bottom, there are 'Previous', 'Next', and 'Cancel' buttons.

9. Accept the *Email* field as the field to use to store the email address and press *Next*.



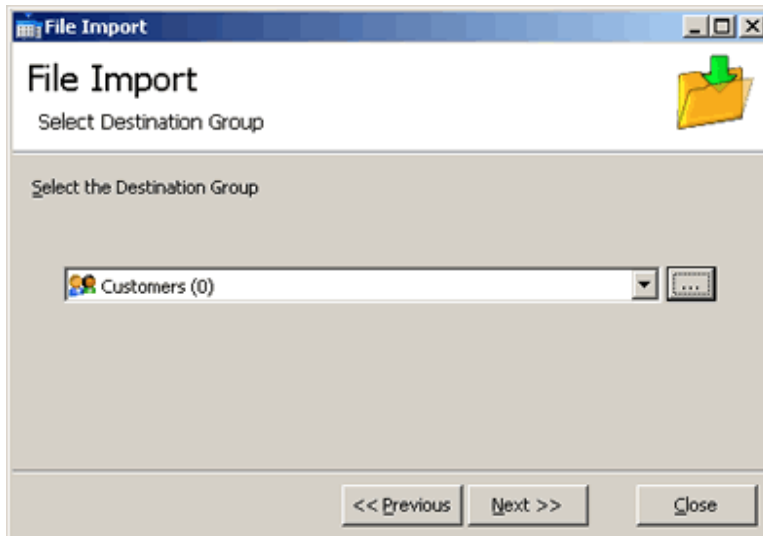
The screenshot shows a dialog box titled "Create a New Group" with a close button (X) in the top right corner. Below the title bar, the text "Create a New Group" is displayed in a large font, followed by the instruction "Select the field that contains the recipient Email address" and a small icon of two people. The main area is titled "Named Fields" and contains the same instruction. Below this, there is a label "Email field:" followed by a dropdown menu with "Email" selected. At the bottom, there are three buttons: "Previous", "Next" (which is highlighted with a dashed border), and "Cancel".

10. Type in a name for your group and press *Next*.

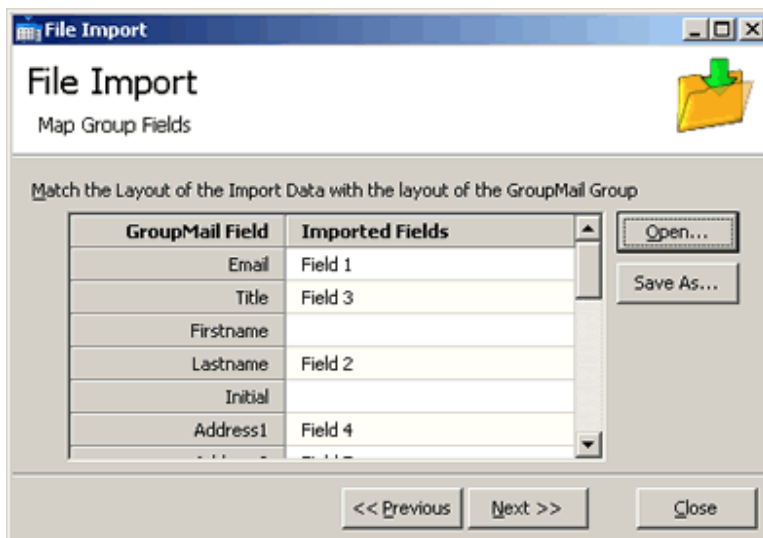


The screenshot shows the same dialog box, now at the "Final step". The title bar and main heading are the same. The instruction now reads "Please enter a name for this new Group and then click 'Create'", accompanied by the two-person icon. Below this, there is a label "Group Name:" followed by a text input field containing the word "Customers". At the bottom, the buttons are "Previous", "Create" (highlighted with a dashed border), and "Cancel".

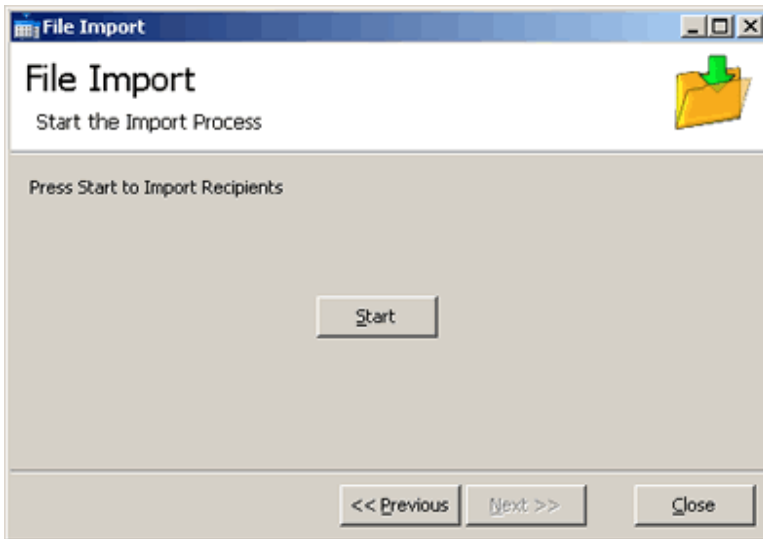
11. Press *Next* to use your newly defined group.



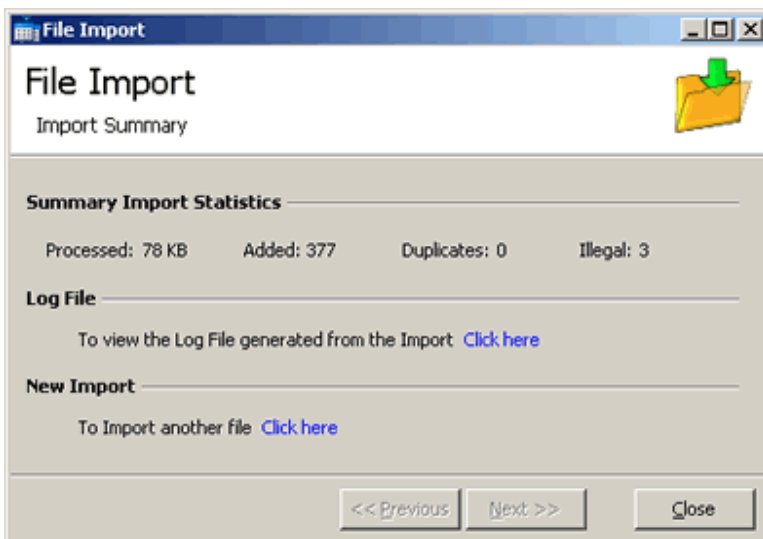
12. Select the Actinic to Group mail field mapping file. Press the *Open...* button and select the *ActinicImportFile.gil* file. This is installed into the main installation directory (e.g. C:\Program Files\MoleEnd\1StopEmail\V7). Press *Next*.



13. Press *Start* to start the import.



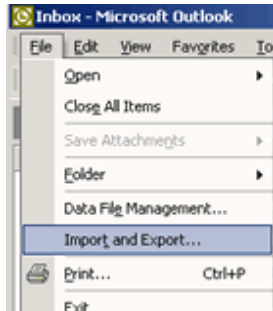
14. After the import the number of entries processed (and errors) are shown. Press *Close*.



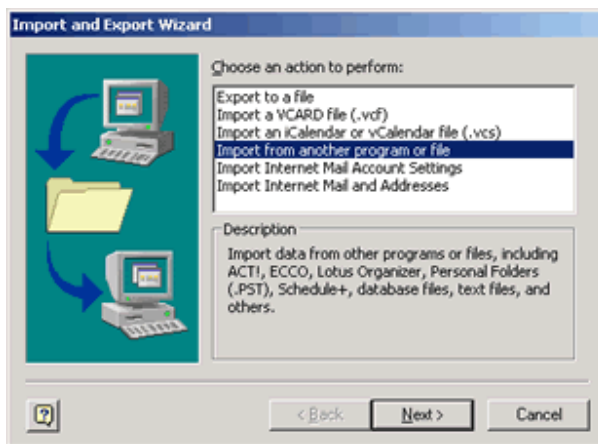
The customer details have now been imported.

Importing into Microsoft Outlook

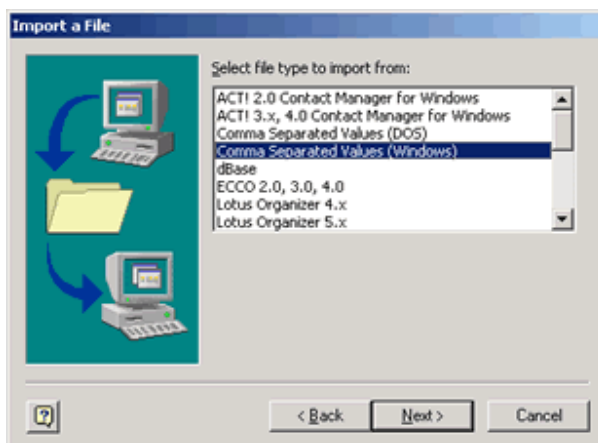
Run the import wizard by selecting *Import and Export*.



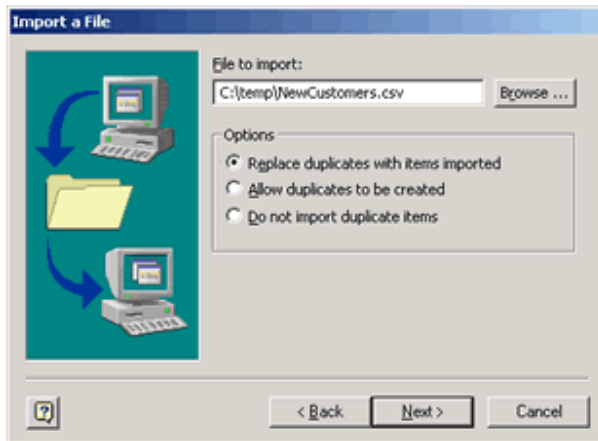
Select the *Import from another program or file* import type.



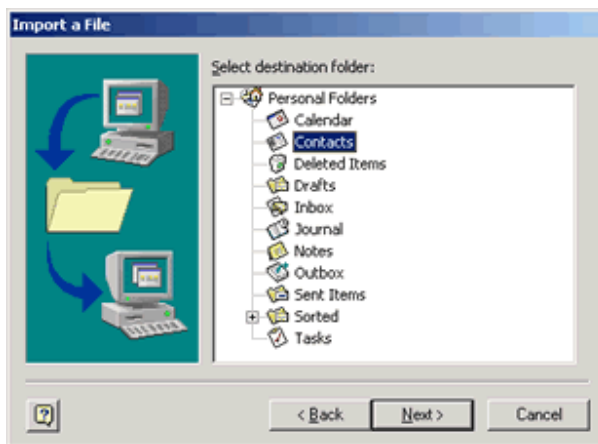
Select the *Comma Separated Values (Windows)* type.



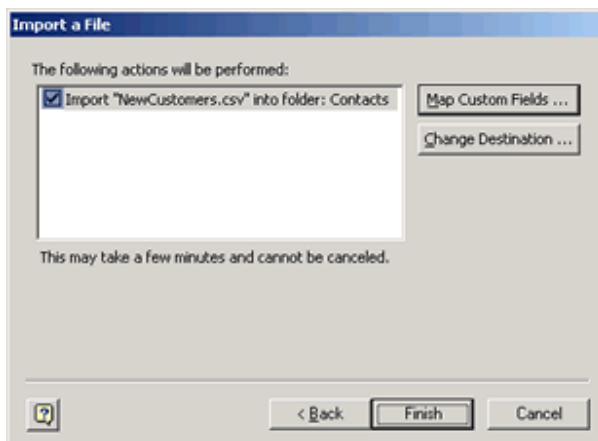
Enter the customer details file created by One Stop Marketing for Actinic. You should also set the *Replace duplicates with items imported* option.



Select the *Contacts* folder.



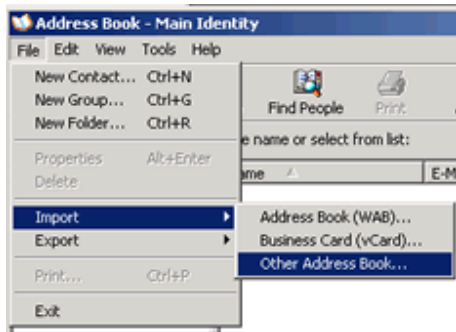
Press the *Finish* button.



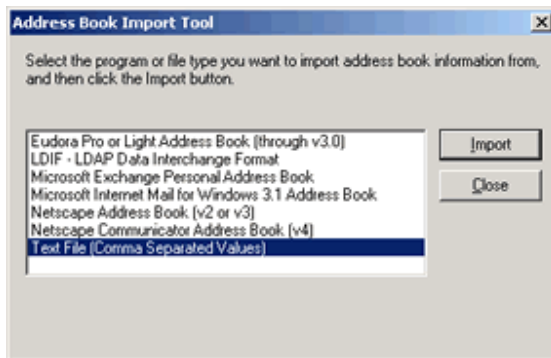
Any errors will be reported otherwise the entries will appear in the *Contacts* folder.

Importing into Microsoft Outlook Express

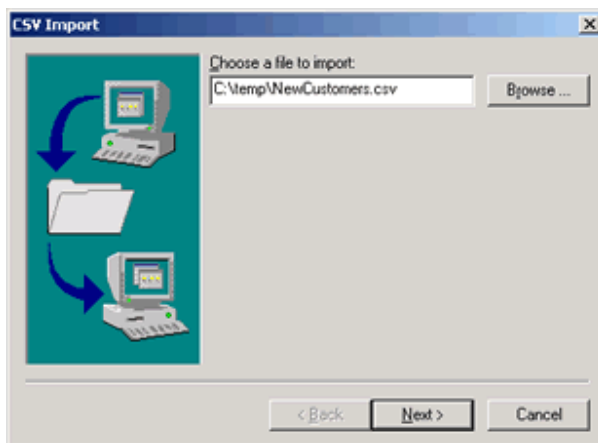
Select the *Other Address Book* option from the *Import* menu.



Select the *Text File (Command Separated Values)* import type.

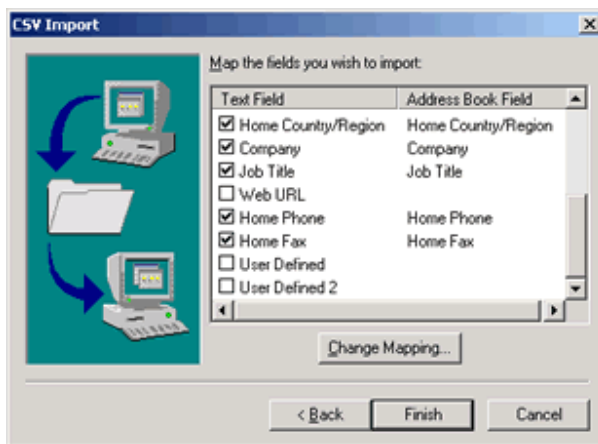
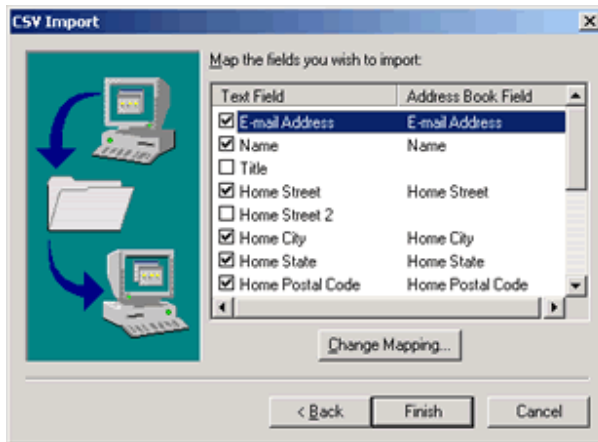


Enter the customer details file created by One Stop Marketing for Actinic and press the *Next* button.



Outlook Express does not have any direct mappings for the *Title*, *Home Street 2*, *Web URL*, *User Defined* or *User Defined 2* fields. If you need any of this information you will need to map these to existing Outlook Express fields. If you are using the customer addresses you should map the *Home Street 2* field. Tick the required field and select the nearest match from the offered list.

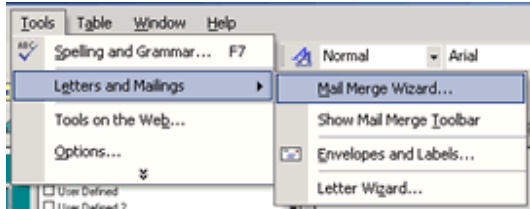
Press the *Finish* button.



Any errors will be displayed and the customer details will be imported into your address book.

Importing into Microsoft Word

You can use the addresses directly from the CSV as part of a mail merge. To do this select the *Mail Merge Wizard* from the *Letters and Mailings* option.



Follow the wizard's prompts. When you are asked to supply an existing file for recipients specify the filename entered in One Stop Marketing for Actinic.

NOTE: It is easier to set-up Mail Merge using an Excel spreadsheet or Outlook recipients. To do this first import the exported customer details into either Excel or Outlook and specify this as the source for recipients in the Mail Merge wizard.

Importing into Microsoft Excel

Excel can open CSV files in their native format. Simply open the file from within Excel or double click the file from explorer.