

# *ACTIVE Net* Quick Reference Guide: Marketing

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## Add/modify subscription lists

*Subscription lists are used to send electronic or postal communication to customers who subscribe to the list during account creation or editing*

- 1) Click the **Communication** banner tab
- 2) In the left navigation bar, click List Builder>**Subscription List**
- 3) Click **Add New** to add a new subscription list or click the list name of the desired list to modify it
- 4) Enter information and select Interest Lists as necessary
- 5) Click **Save**

## Subscribe to subscription lists

- 1) Click the **Customers** banner tab
- 2) Enter customer search criteria and click **Search Now**
- 3) Click the name of the desired customer account  
Tip: If the customer is not found, click **Add New Customer**, enter information as necessary and skip to step 6
- 4) In the Customer Summary section of the Customer Account dashboard, click **Edit**
- 5) Click Name and other Details>**Change Address**
- 6) In the Contact Information widget, check the boxes next to the desired subscription lists
- 7) Click **Save**  
Tip: Customers creating or accessing their account online may opt in or out of subscription lists via the **Change your Address and Personal Information** link

## Add/modify customer lists

*Customer lists are lists of customers selected and grouped together based on various criteria for the purposes of sending automated mass email messages, or to print mailing labels for promotional postal mail*

- 1) Click the **Communication** banner tab
- 2) In the left navigation bar, click List Builder>**Create Customer Lists**
- 3) Click **Add New** to add a new customer list or click the title of the desired list to modify it
- 4) Enter a name for the list and select the desired filters for the list

- 5) Click **Generate List** to save the list and generate a list of customers who match the selected criteria or click **Save Definition** to save the list without generating a list

Tip: Create a “Master List” with no filters to generate a list of *all* customers

## Send broadcast emails

- 1) Click the **Communication** banner tab
- 2) In the left navigation bar, click Email/Form Letter>**Create Email/Form Letter/Text Message**
- 3) In the Custom Lists widget, select the desired recipient Customer List in the Custom List drop-down list

Tip: Customer Lists available here are created in “Add/modify customer lists”

- 4) In the Email Content widget, select who the email will be **From** and enter the **Subject**

- 5) Enter the **Body Text**

Tip: Select options in the **Merge Field** drop-down list and click **Insert** to add dynamic, customer specific information

- 6) Configure other settings as necessary

Tip: Enter a **Send Date and Time** to schedule when the email is to be sent

- 7) Click **Send Email**

Tip: **Form Letters** and **Text Messages** can also be sent from this menu

### General email guidelines

- Keep the email short and concise
- Attach latest brochure, forms, and waivers
- Check the **Track Email Open/Click Through?** box to request customer acknowledgement

## Marketing reports

### Catalogs

*Create lists of activities or FlexReg programs*

- 1) Click the **Customer** banner tab
- 2) In the left navigation bar, click Catalogs>**Activities** or Catalogs>**Programs**
- 3) Select an output file format
- 4) Enter applicable criteria
- 5) Click **Submit**

## Labels

*Create Avery 5160 labels using customer lists*

- 1) Click the **Customer** banner tab
- 2) In the left navigation bar, click Labels>**Create Labels**
- 3) Select the desired Customer List and configure other settings as necessary
- 4) Click **Run Report**

## Email Reports – Open/Click Through

*Create lists of customers who clicked on the link in a broadcast email to acknowledge receipt*

- 1) Click the **Customer** banner tab
- 2) In the left navigation bar, click Email/Form Letter/Text Message>**Open/Click Through**
- 3) Select an **Email Batch** to report on
- 4) Select an output file format
- 5) Click **Run Report**

## Email Reports – Opt-Out

*Create lists of customers who clicked on the link in a broadcast email to unsubscribe from or modify their subscriptions*

- 1) Click the **Customer** banner tab
- 2) In the left navigation bar, click Email/Form Letter/Text Message>**Opt-Out**
- 3) Select an **Email Batch** to report on
- 4) Select an output file format
- 5) Click **Run Report**

## Email Reports – Results

*Create lists identifying emails successfully/unsuccessfully sent*

- 1) Click the **Customer** banner tab
- 2) In the left navigation bar, click Email/Form Letter/Text Message>**Results**
- 3) Select an **Email Batch** to report on
- 4) Select an output file format
- 5) Click **Run Report**

## General Reports – Customer Listing

*Create lists of customer's names, contact information, gender, age, and resident status*

- 1) Click the **Customer** banner tab
- 2) In the left navigation bar, click General Reports>**Customer Listing**

- 3) Select the desired Customer List and configure other settings as necessary
- 4) Click **Run Report**

## General Reports – Transaction Comparison Report

*Create lists of statistical and summary counts showing increases/decreases of online vs. staff transactions over a maximum of three periods*

- 1) Click the **Customer** banner tab
- 2) In the left navigation bar, click General Reports>**Transaction Comparison**
- 3) Select the desired module to report on
- 4) Click **Continue**
- 5) Select the desired Customer List
- 6) Select the Main Comparison Period Date Range
- 7) Select the Second and Third Period Date Ranges as necessary
- 8) Configure other settings as necessary
- 9) Click **Run Report**