

CRM DRIVEN SOLUTIONS FOR SPORT & LEISURE

GREEN 4
ECOMMS 4 USER GUIDE



Microsoft Partner
Gold Independent Software Vendor (ISV)

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ABOUT THIS DOCUMENT

This document has been prepared as a User Guide for EComms 4.

NON-DISCLOSURE

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DOCUMENT CONTROL

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1.0	24/10/2014	This is a new document	JW
1.1	03/11/2014	Updated What's New section	CP
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1. INTRODUCTION

1.1 WHAT'S NEW?

The following points outline the updates that have been implemented with Version 4.

- Communication Audiences – the communication audience can now comprise of any entity in the system, not just the recipients of the communication i.e. contact, lead or account. For example, you can now create an audience comprising of bookings made that include a certain product. On the communication form, if a Communication Audience is selected, there is a drop down box to select a field that defines the relationship between the entity and the audience. In this booking example, the drop down would show a list of any fields on the booking e.g. the Purchaser could be selected and the communication could be sent to all contacts who made the purchase.
- Communication Files and Templates - the mechanism for attaching Communication templates and Communication files has changed. This enables you to store templates and files as notes in CRM and access them in the future should amendments be required.
- Communications - the HTML editor used when creating a communication has been updated.
- Communications – the facility to add a Regarding field through the HTML editor has been included. This enables you to easily add fields relating to the communications content e.g. adding the Booking Reference to a Booking Confirmation email.

1.2 EMAIL MARKETING IN CRM

Microsoft Dynamics CRM is a business software application that allows companies of all sizes to track, manage and report on their customer interactions.

A powerful addition made by Green 4 Solutions is the ability to communicate with clients through email, directly from the system itself.

The email marketing functionality in Green 4 Ecommunications can be utilised in a number of ways to distribute different email formats. Some examples of the type of email communications that can be sent from the system include:

Types of Ecommunications	Definition
Newsletter	These types of engagement emails can be sent periodically (usually bi weekly or monthly) and can provide customers with updates about your business.
Promotional Emails	An example of this may be a ticketing email for a football club, sent during the week before a fixture. This email may contain an offer for the game.
Booking Confirmations	These emails can be triggered automatically from the system through Workflows once a booking is made. They will include booking reference details and event information.

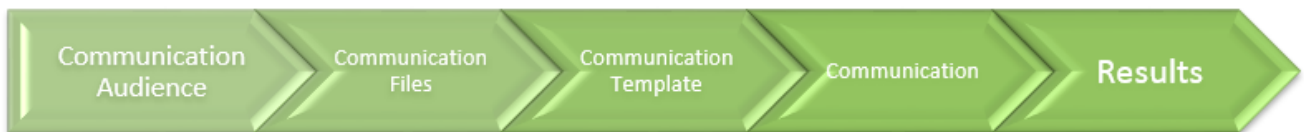
The content viewed by the audience members can be personalised using information extracted from the Microsoft CRM database. The strength of Green 4 Ecommunications is the ability to target communications to audience members, ensuring only relevant materials are issued and that these materials are personalised for the recipient.

During the running of an Ecommunication the pages visited by audience members are recorded using click stream analysis. This analysis can be used to audit the success or failure of the communication campaign. In addition the audit information collected can be used to build a profile of each user’s interests. Through profiling the outcome of previous Ecommunication campaigns, you can further refine your audience member selections ensuring improved targeting of future Ecommunications.

Finally, Ecommunications can give audience members the opportunity to update the information you hold. By using communications in this way you can ensure the accuracy of your data.

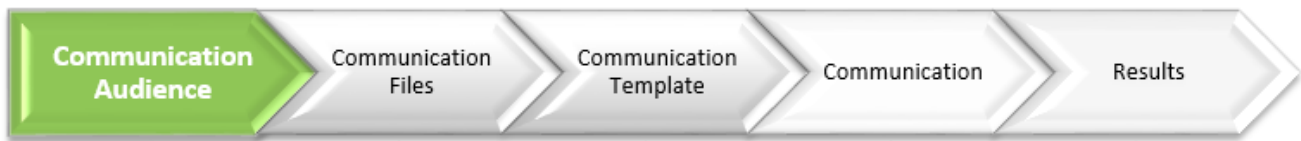
1.3. THE PROCESS

To create an email to send out to your customers, the diagram below offers a step by step process to achieve this. Each step is explored in further detail throughout this document.



Process	Definition
Communication Audience	Created either using Communication Audiences or Marketing Lists. These are the contacts that will be receiving the electronic material.
Communication Files	Can be images or documents. They are the individual elements that can contribute to the look and feel of an email. I.e. used on an email if it requires a header image, this would need to be uploaded to the CRM in order to add it to an email through communications.
Communication Template	HTML files that define the structure and appearance of an email communication distributed to a particular audience. They are created outside of CRM and subsequently imported ready for distribution. This process is usually managed by Green 4 Solutions.
Communication	A communication is where the email itself is constructed and sent. All components (templates, files, audiences) are pulled together at this point.
Results	Once the email has been sent, statistics can be used to see how successful the campaign which can then be used to inform future campaigns, ensuring continual improvements.

2. AUDIENCES



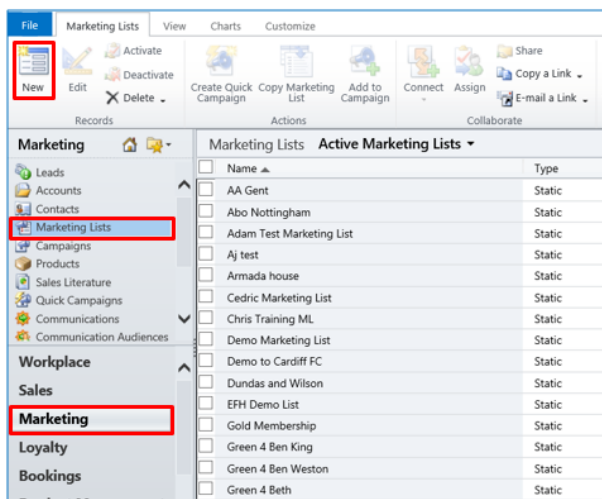
The audience for your communication is built using either **Marketing Lists** or **Communication Audiences**. These are the contacts that will be receiving the electronic materials.

2.1. MARKETING LISTS

The Marketing List option allows you to create either a static or dynamic list of contacts, accounts or leads. A dynamic Marketing List will update whenever the data in CRM does. For example, if a **dynamic** Marketing List is set up with all contacts with an email addresses added, if there was an import of 5,000 additional contacts with email addresses – they would automatically be added to the Marketing List. **Static** Marketing Lists work in the opposite way, once the group has been created, they will not update, regardless of whether or not the data in CRM does. Dynamic Marketing List cannot be used in conjunction with the Green 4 Ecommunications.

To create a Marketing List in Microsoft CRM:

- a) From the Navigation Panel, select **Marketing**.
- b) In the **Marketing Area** of Microsoft CRM, select **Marketing Lists**



- c) The Marketing Lists View will be displayed. Select **New** on the ribbon
- d) The Marketing Lists Form will be displayed.

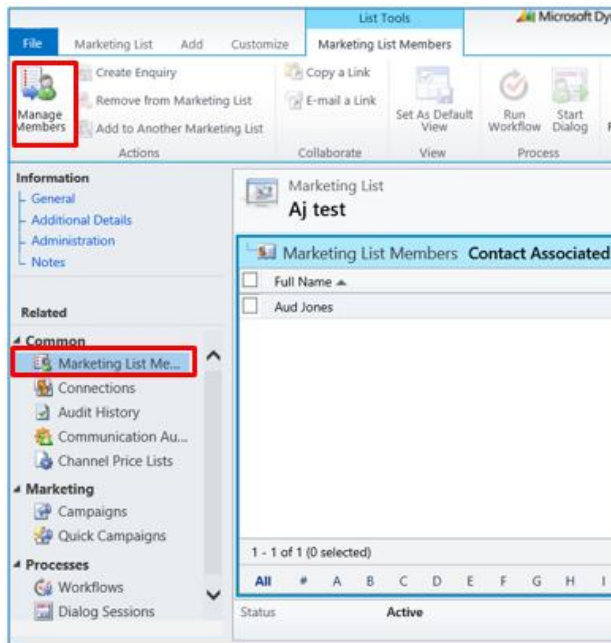
e) Enter the following.

- **Name.** Enter a name to call your marketing list.
- **Member Type.** From the drop down list enter the Member Type from the choice of Account, Contact or Lead.
- **Type.** Select for your marketing list to either be **Static** or **Dynamic**.
- **Is Members List.** Select Yes or No depending on if the list is for Members.
- **Purpose.** Enter a reason as to why the marketing list has been created.
- **Source.** Enter the Source of the marketing list.
- **Modified On.** This field will automatically update.
- **Currency.** The default currency will already be displayed in the field.
- **Cost.** If applicable, enter the cost of the marketing list.
- **Last Used On.** This field will automatically update.
- **Locked.** Select **Yes** if the marketing list is to be locked.
- **Owner.** The Owner of the Marketing List will automatically be displayed.
- **Description.** Enter a description of the Marketing List.

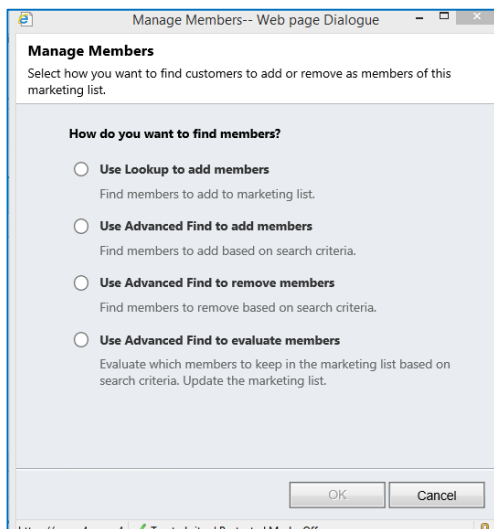
f) Select **Save** on the ribbon

g) Under **Common** in the **Form Navigation Panel** select **Marketing List Members**

h) Select **Manage Members** on the ribbon



- i) The Manage Members dialogue box will appear. Select one of the following before selecting Ok to find members to add to the Marketing List.



- **Use Lookup to add members.** Select if you would like to simply add contacts to the marketing list
- **Use Advanced Find to add members.** Select if you would like to add contacts to the marketing lists based on a certain search criteria.
- **Use Advanced Find to remove members.** Select if you would like to remove contacts from the marketing list based on a certain search criteria.
- **Use Advanced Find to evaluate members.** Select if you would like to evaluate which contacts to keep in the marketing list based on a certain search criteria. This can be used to update the marketing list.

- j) Once the list is complete, select **Save and Close** on the ribbon.

2.2. COMMUNICATION AUDIENCES

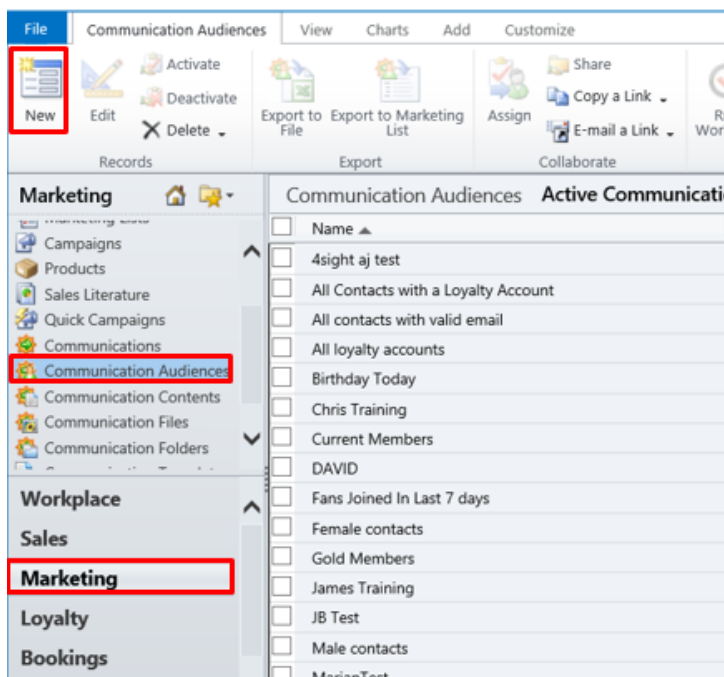
Communication audiences are built using a set of predefined **Audience Rules** (created by Green 4 Solutions); these are set up in order to easily segment large portions of the database, based upon criteria such as email address, bookings, fixtures, communications received, etc.

Communication audiences allow the end user to easily collate a number of contacts with the end goal of communicating to them through email or SMS.

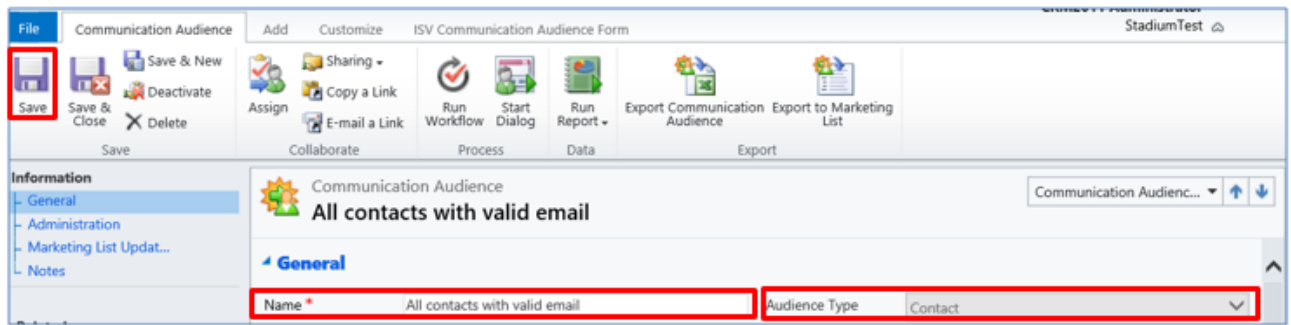
Communication audiences are **dynamic**– they will automatically update when the audience is used based on the criteria initially defined through the audience rules.

Below is a step by step guide to creating a Communication Audience:

- a) From the **Navigation Panel**, select **Marketing**
- b) In the **Marketing Area** of Microsoft CRM, select **Communication Audiences**
- c) The Communication Audiences View will be displayed. Select **New** on the ribbon



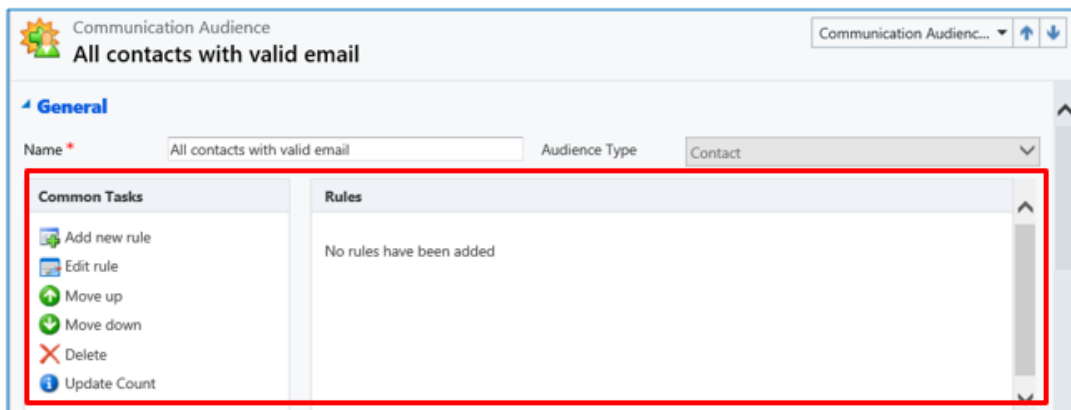
- d) The Communication Audiences Form will be displayed.



- e) Enter a **Name** for the audience and select the **Audience Type** from the drop down list. Select **Save** on the ribbon



Note. Before rules can be added for your audience you must select **Save** after entering the Name and Audience Type.



- f) Use the **Rules area** to define the rules that determine membership of the audience. For example the type of rules are in place allow users to add contacts with a birthday in the next 7 days. Select **Add new rule** in the rules area.
- g) Upon selecting Add new rule the Communication Audience Rule Wizard will be displayed, select **Next** on the first window that is shown. This will bring you to the Specify Rule Type widow. Select one of the following before clicking **Next**.
- o **Add members.** Select if you would like to create a rule that will add members to the list.
 - o **Remove members.** Select if you would like to create a rule that will remove members form the list.

- **Evaluate members.** Select if you would like to create a rule that will evaluate which members to keep in the list.

Specify the Rule Type
Specify whether the rule will add, remove or evaluate members.

Add members
Creates a rule that will add members to the list.

Remove members
Creates a rule that will remove members from the list.

Evaluate members
Creates a rule that will evaluate which members to keep in the list.

< Back **Next >** Cancel

Specify the Rule Criteria
Choose a category:

Choose a category:
Email Address

Now select the criteria:
Contacts with valid E-mail
Contacts with valid E-mail Address 2
Contacts with valid E-mail Address 3
Contacts with duplicate E-mail

< Back Next > Cancel

- After selecting **Next** the Specify the Rule Criteria window will open. This is where the category and criteria of your rule is selected. To choose a category select the drop down menu at the top of the window and select the relevant category.
- After choosing the Category, the criteria related to it will be displayed. Select the relevant criteria from the list that is shown and click on **Next**. This will add a rule to the Rules Area. Repeat the above process until all the required rules are added to the Rules Area.
- Once rules have been added, the **Update Count** button can be used to make sure the number of contacts is correct.
- The order of the rules is important. Make sure the rule adding the majority of members is on top, and then remove and evaluate from there.
- Once the rules are complete, select **Save** on the ribbon

2.3. COMMUNICATION AUDIENCES VS MARKETING LISTS - IN BRIEF

Both marketing lists and communication audiences can be repeatedly used with different communications. However, the subtle difference between the two methods of defining your audience is that **marketing lists are static** and are not automatically updated each time a communication is run, whereas **communication audiences are dynamic** and are automatically refreshed each time the audience is used. Communication audiences ensure that new customers who meet your audience criteria are automatically included.

There are also two “silent rules” automatically running on all communication audiences. These are the removal of inactive contacts and the removal of unsubscribed contacts, increasing the effectiveness of your audience.

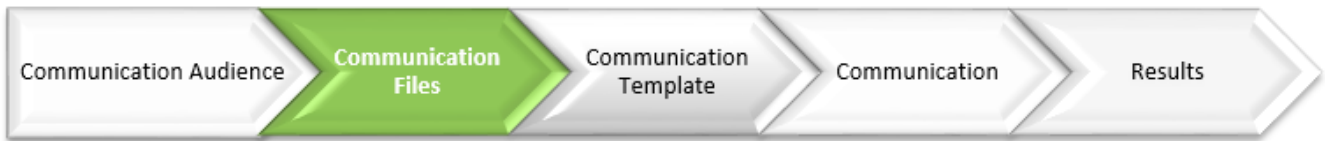
Audience Rules

Audience Rules	
Dynamic	The rules governing communication audience memberships are dynamic. This means that the audience members will update when the data does. For example if an audience rule is in place to add contacts with all email addresses, whenever a new contact is added to the database - with an email address, the contact will automatically become a member of this audience.
Easy English language queries	Audience rule queries are written in straightforward English language. For example, adding contacts with a birthday after a certain date. The rule used would be “Contacts with Birthdate after DD/MM/YY”, with the date being added via a calendar look up.
Saved search criteria only	The search criteria governing audience rules are saved and not editable. Whilst audience rules try to provide as much flexibility in its ability to segment data, there may be queries that are not achievable through the rules already outlined. Audience rules can be added or modified upon request by Green 4.

Marketing Lists

Marketing Lists	
Static	The rules governing a marketing list are static. This means that once a query is run and members added to a marketing list – they will not update, regardless of whether or not the data changes.
Complex queries	The language used in advanced find is not as straightforward as audience rules. Some knowledge of how the database functions may be required in order to execute more complex queries
Complete flexibility on data search	It is very rare that a segment of data is not achievable through the advanced find functionality that governs membership of a marketing list.

3. COMMUNICATION FILES



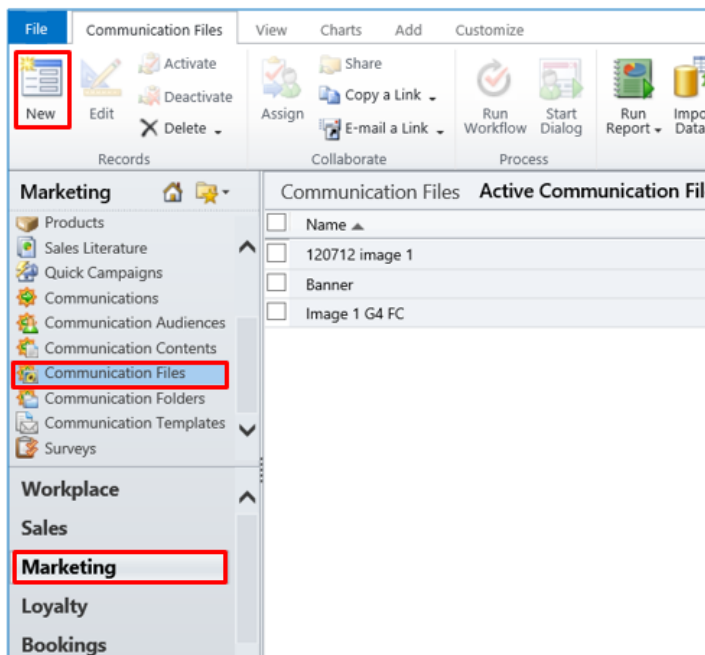
Communication files can be images or documents. They are the individual elements that can contribute to the look and feel of an email. An example of a communication file is the header of an email, or images to form a part of the email. An example of when a communication file would be used on an email is if it requires a header image, this would need to be uploaded to the CRM in order to add it to an email through communications.

Communication folders help to group files into separate groups for better organisation. When a communication file is added to the system it will be necessary to add the file to a communication folder. When adding a communication file to a communication, you will need to access the communication folder, before selecting the image to add to the email.

3.1. CREATING A COMMUNICATION FILE

Below is a step by step guide to creating a new communication file:

- a) From the **Navigation Pane** select **Marketing**
- b) In the **Marketing Area** of Microsoft CRM, select **Communication Files**



- c) The Communication Files View will be displayed. Select **New** on the ribbon
- d) The Communication Files Form will be displayed.

e) Enter the following:

- **Name.** Enter a name for the File.
- **Parent Folder.** The file needs to be associated with a communication folder. Click the **look up button** and select either an existing folder, or create a **New** one.

f) Select **Save** on the ribbon.



Note. Before a file can be uploaded you must select Save after completing Name and Parent Folder fields.

g) Select the **Add** tab on the ribbon before selecting **Attach File**.

h) An attachment box will appear. Use the **Browse** button to search for the relevant file on your computer. Once this is completed, select **Attach**. The file should appear in the **Note** section of the Communication File form.

i) Next, in the **Upload Communication File** section of the form ensure that the **Select File** field is complete with the file that you have just uploaded.

j) Once all required fields are complete, select **Save** on the ribbon

k) Select **Save and Close** on the ribbon.

4. COMMUNICATION TEMPLATES



Communication templates are HTML files that define the structure and appearance of an email communication distributed to a particular audience. They are created outside of CRM and subsequently imported ready for distribution. This process is usually managed by Green 4 Solutions.

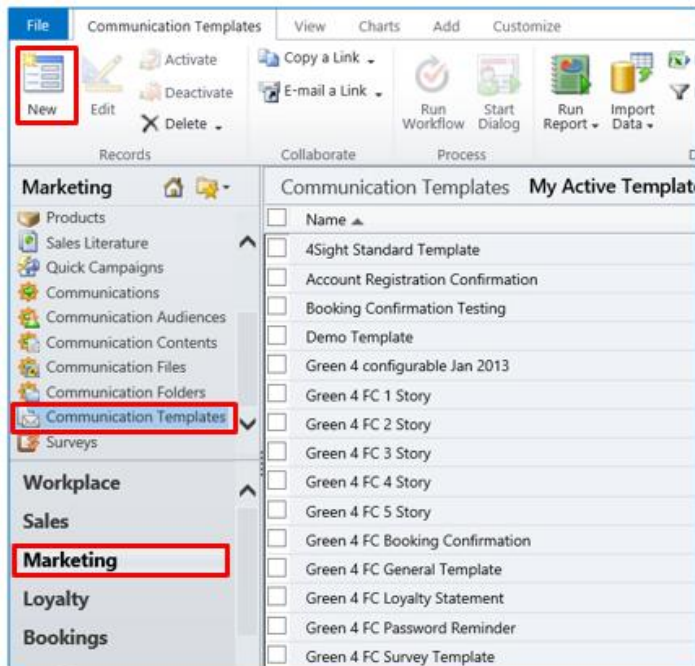
- Templates have attributes that define where certain content will be situated
- These regions of the email are fully editable from within CRM
- It is important to consider which template will be best for your suite of communications.

AN EXAMPLE OF THE TYPES OF TEMPLATES USED:

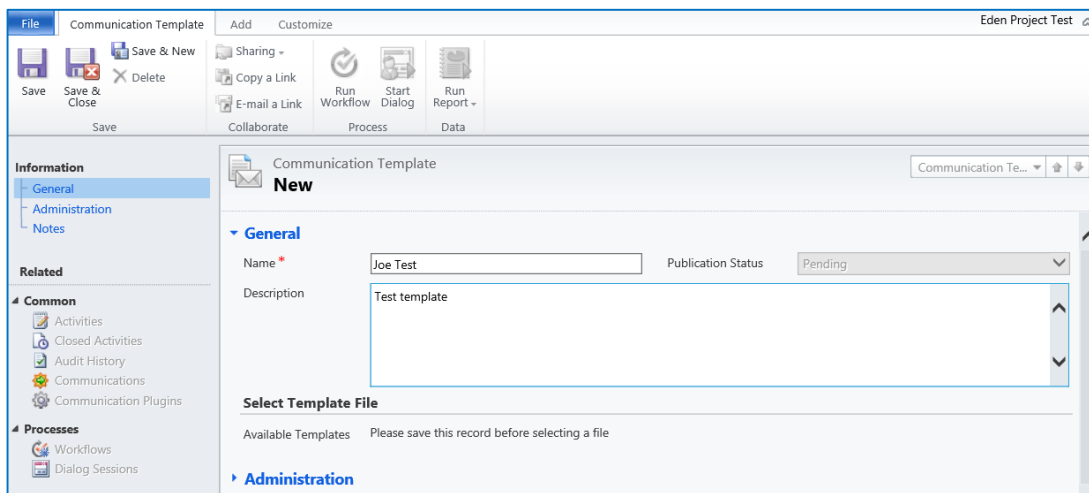
Template Type	Definition
Standard Template	This template offers the user full flexibility in terms of what content the email has. All regions of the email (header, main body, footer, background colours etc.) are editable from within the CRM system, this is a suitable template for organisations wishing to continually modify and adapt the email communications.
E-flyer	This template requires a series of images to be added to the communication in order to create a full 'flyer' type image to be distributed. The reason it is separated into a number of images is that some email providers will only accept images of a certain size, and may therefore delete some of the image if it is too large.
Booking Confirmation	This is a generic template that is deployed when ticketing is deployed as part of the system. When a booking is made it automatically distributes a communication to the booking contact with details of the booking and event.
Password Reminder	This is also a standard template that is used in conjunction with user portals. When a contact signs in through the forgotten password section, an email is generated containing the contact's password.
Survey Templates	This type of template can be designed however a customer wishes.

When Green 4 Ecommunications is deployed the customer will be typically provided with a range of templates that suit the requirements for the organisation. In the unlikely event that you are required to upload a new communication template, below is a step by step guide to how this can be achieved:

- In the navigation area select **Marketing** before selecting **Communication Templates**.
- The Communication Templates View will be displayed. Select **New** on the ribbon.



c) The Communication Template Form will be displayed. Enter the following:



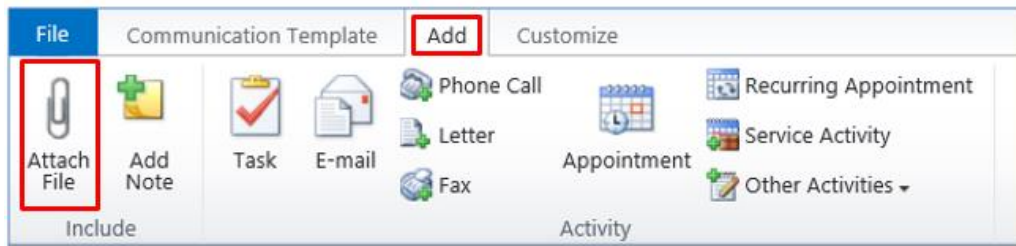
- **Name.** Enter a name for the Communication Template.
- **Publication Status.** This will be already completed and will change to reflect the status of the Communication Template.
- **Description.** Enter a description of the Communication Template.

d) Select **Save** in the ribbon.

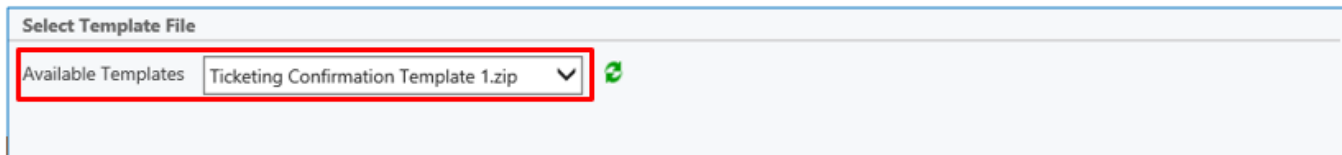


Note. Before a template can be selected you must select **Save** after completing the name field.

- e) In order to upload a new template, select the **Add** tab in the ribbon before selecting **Attach File**.



- f) An Attachment box will appear. Select **Browse** and choose the template **zip file** from the location saved.
- g) Click **Attach**, the template file will appear in the Notes section of the Communication Template form. Ensure that the Available Templates field is selected with the zip file that you have just uploaded.



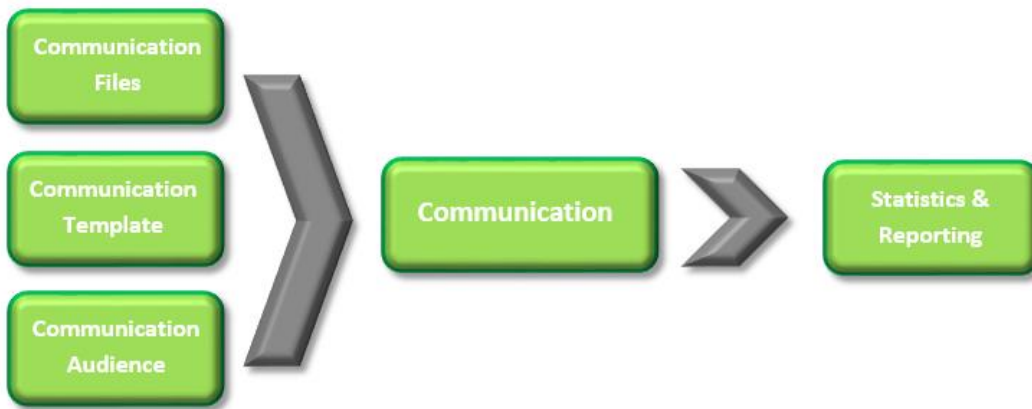
- h) Once all required fields are complete, select **Save and Close** on the ribbon.

5. COMMUNICATIONS



A communication is where the email itself is constructed and sent. All previously discussed components (templates, files, audiences) are pulled together at this point.

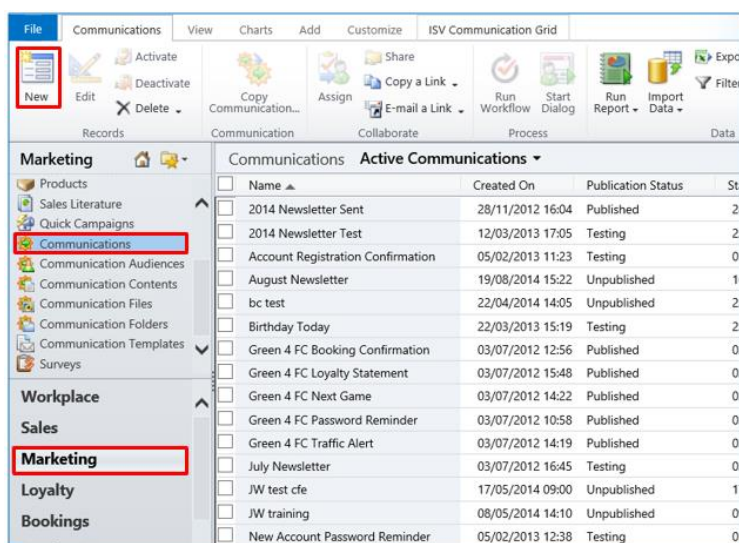
The below diagram aims to demonstrate the process involved in generating and sending a communication from CRM:



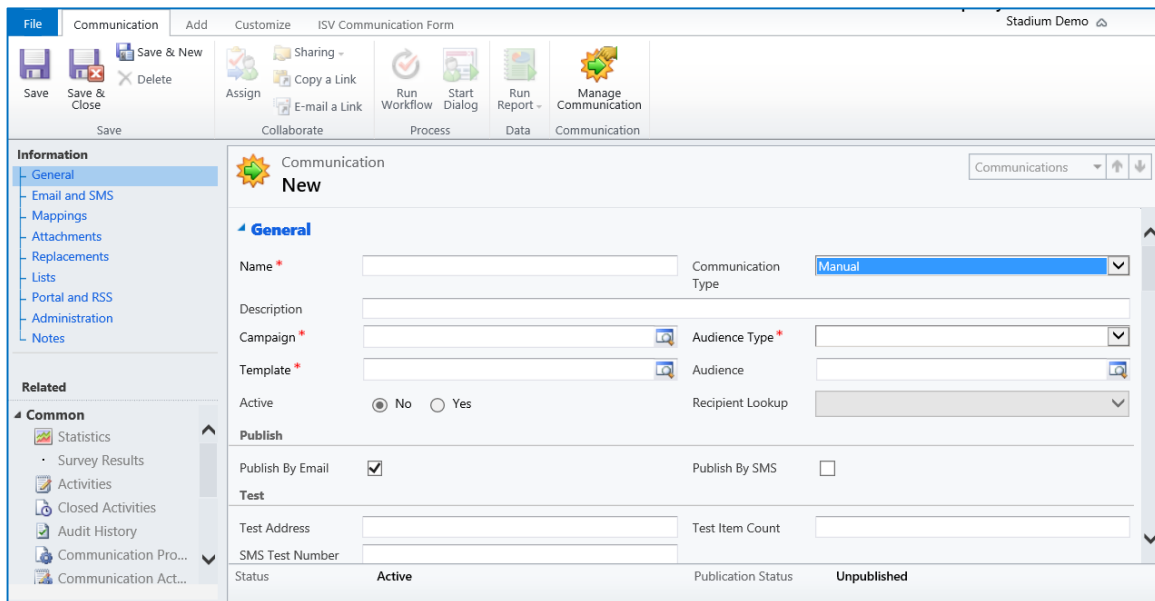
5.1. CREATING A COMMUNICATION

Below is a step by step breakdown of how to create a communication:

- a) From the **Navigation Panel** select **Marketing**.
- b) With the **Marketing area**, select **Communications** in the **Form Navigation Panel**.



c) The Communications View will be displayed. Select **New** on the ribbon.



d) The Communications Form will be displayed. Using the **General** section of the form complete the following details:

- **Name.** Enter a name for the communication.
- **Communication Type.** Use the drop down list to select if the Communication is to be **Automated or Manual**. Automated would be selected for an email that is triggered by a workflow when sent out i.e. a booking confirmation.
- **Description.** Enter a description of the communication.
- **Campaign.** Use the Lookup to select the relevant Campaign or create a new campaign.
- **Audience Type.** Select the audience type to be used. The audience type selected will determine which communication audiences or marketing lists will be used. There is a choice of **Contact, Account or Lead**.
- **Template.** Use the **Lookup Records Dialog** to select the template created previously.
- **Audience.** If using a **Communication Audience** to define the recipients of the communication, use the audience field to select the communication audience.
- **Active.** This field will automatically update.
- **Recipient Lookup.** This field will be greyed out.
- **Publish By Email.** Tick this box if you would like your communication to be published by email.
- **Publish By SMS.** Tick this box if you would like your communication to be published by SMS.



Note. To send eComms via SMS, an SMS template would need to be in place and an account with an SMS supplier. Green 4 have an interface with the supplier eSendex.

- **Test Address.** If publishing the communication by email, enter a test email address for the communication to be tested upon
- **Test Item Count.** Enter the number of test communications that the Test Address will receive.
- **SMS Test Number.** If publishing the communication by SMS, enter a SMS number for the communication to be tested upon.
- **Start Date.** Enter a start date for the communication.
- **End Date.** Enter an end date for the communication. The end date will determine when the communication landing pages expire.

e) Once the details are complete select **Save** on the ribbon.



Note. The layout of the Email and SMS tab and the Mappings area will differ depending on which Template is being used.

f) Select the **Email and SMS tab** heading in the **Form Navigation Panel** and enter the following details:

The screenshot displays the 'Email and SMS' configuration screen for a communication titled 'Joes Communication'. The interface includes a ribbon at the top with options like 'Save', 'Share', 'Run Workflow', and 'Manage Communication'. On the left, a navigation panel shows 'Email and SMS' as the active tab. The main configuration area is divided into sections: 'Subject' with a text input field; 'Email Addresses' with a table of fields (To Name, To Address, From Name, From Address, Bcc Name, Bcc Address) each having a dropdown menu for 'Use Data From' and a 'Default Value' input field; 'Email Template' with a dropdown for 'Template Page'; and 'SMS' with dropdowns for 'Phone Number' and 'SMS Page'.

- **Subject.** Enter a subject line for the communication email.
- **Email Addresses.** Enter the following details to be used on the communication emails:
 - To Name.** The database field **Full Name** will be automatically selected.
 - To Address.** The database field **E-mail** will be automatically selected.
 - From Name.** Enter the name of the person the email should appear to have come from.
 - From Address.** Enter the email address of the person the email should appear to have come from.
 - BCC Name and Address.** Enter the name and e-mail address of the e-mail account that will receive the 'blank carbon copies' of the communication e-mails. It should be remembered that the selected e-mail address will receive a copy of each of the e-mails sent as part of the

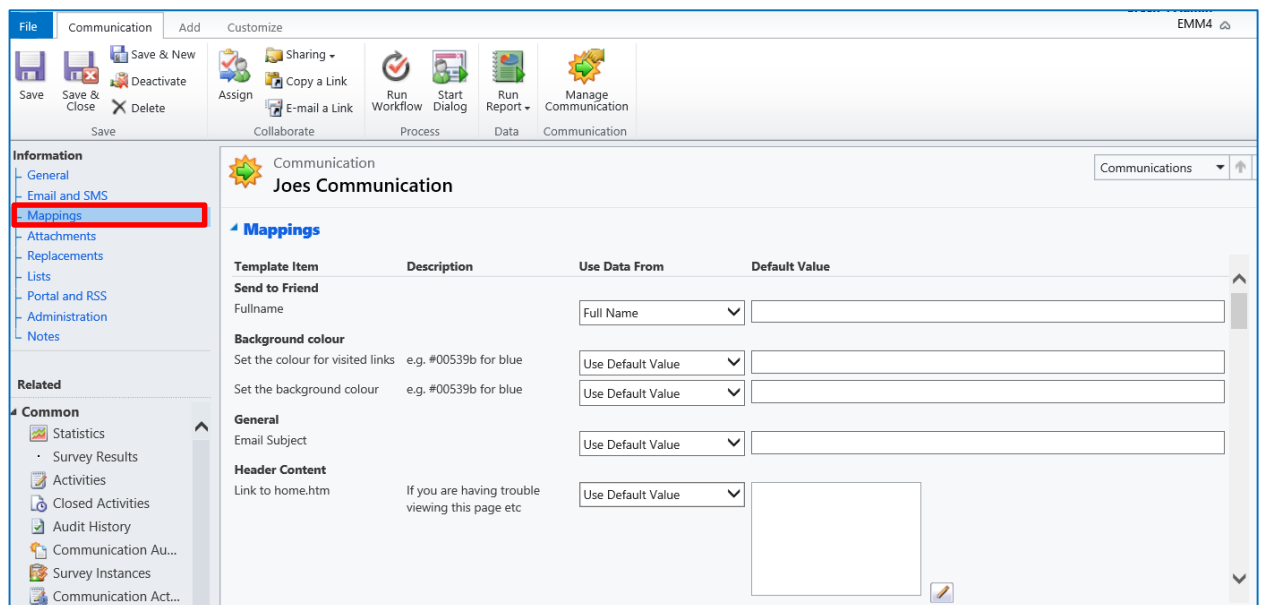
communication, e.g. if you have 100 audience members the BCC e-mail address will receive 100 e-mails.

- **Email Template.** Enter the following details:
 - i. **Template Page.** Select the page from the template materials which is to be used as the initial email sent to recipients.

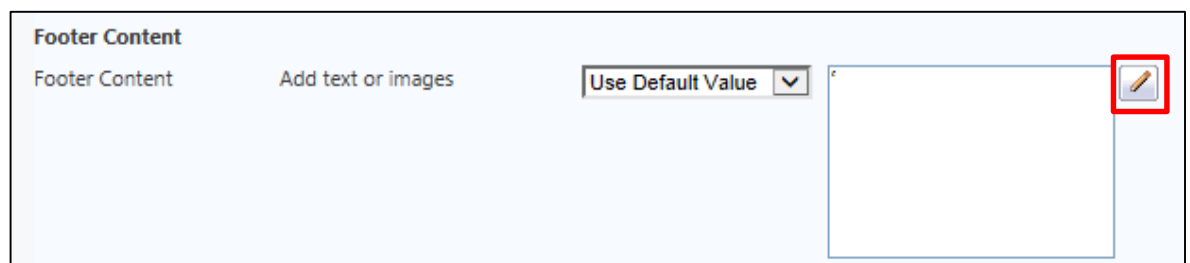
g) Select the **Mappings** heading in the **Form Navigation Panel**, this is where the content and appearance of the communication is added and created, however it must be noted that how the mapping area is displayed depends on the communication template that is being used. For each substitution added to your template materials it will be necessary to map either a database field or enter a default value using the Mappings tab. Complete the relevant fields that are displayed in the mapping area.



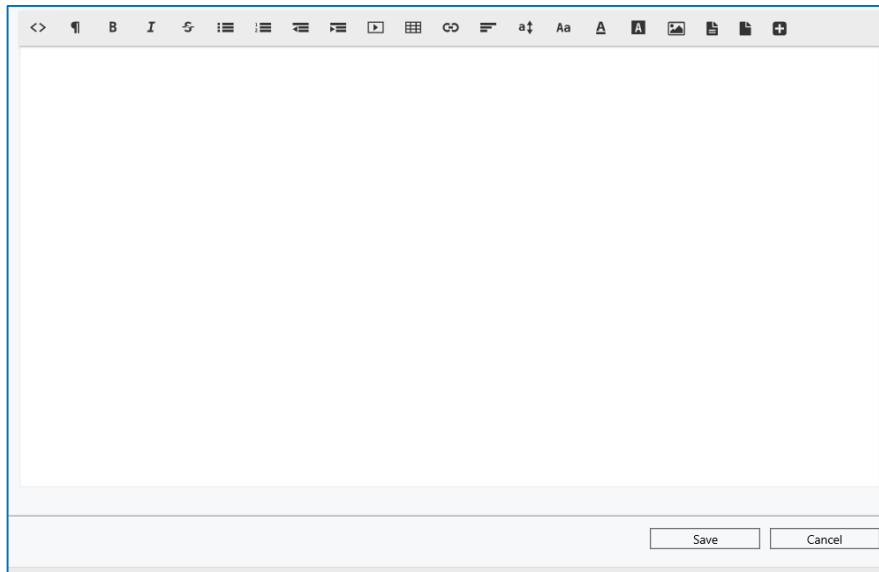
Note. When selecting the Background Colour of your Communication, HTML Colour Codes must be used, the codes are easily accessible online. For example, enter #00539b for blue.



I. To edit the individual **Mappings** select the pencil icon alongside the white box:



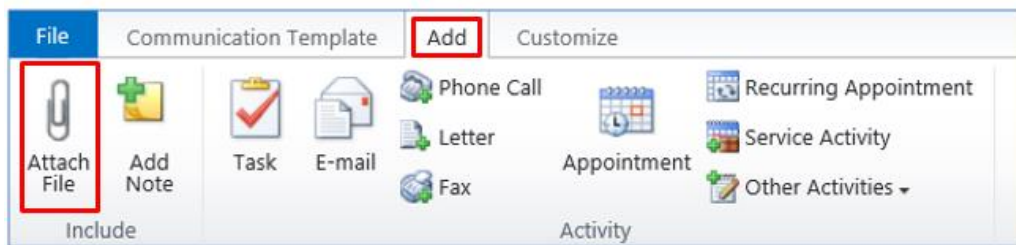
II. This will open the HTML editor:



III. The HTML editor allows users to directly add and edit the content and appearance of an email. When content is added to the editor it is automatically converted into HTML. The editor aims to provide a user friendly way of designing content. Images can be uploaded; hyperlinks can be created as well as general text and table functionality.

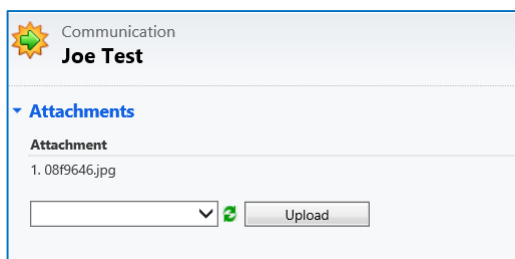
h) Select the **Attachments** heading in the **Form Navigation Panel**. This is where it is possible to upload the images that are to be embedded in the communication as follows:

I. In order to upload an attachment, select the **Add** tab in the ribbon before selecting **Attach File**.



II. An Attachment box will appear. Select **Browse** and choose the template **zip file** from the location saved.

III. Click **Attach**, the file will appear in the Notes section. In the Attachments section of the Communication form select the attachment from the drop down menu before selecting **Upload**.



- i) Select the **Replacements** heading in the **Form Navigation Panel**. All of the replaceable images included in the communication materials will be listed. Use the drop-down list to select the file to be used as a replacement. The drop-down list will detail each of the images added to the communication using the **Files** area of the form.

The screenshot shows a web interface for editing a communication. On the left is a 'Form Navigation Panel' with a tree view containing: Information, General, Email and SMS, Mappings, Attachments, Replacements (highlighted), Lists, Portal and RSS, Administration, and Notes. The main content area is titled 'Communication sw test' and has a 'Replacements' section. This section contains a table with three columns: 'Replace File', 'Description', and 'With File'. The first row shows 'images/header.jpg' as the file to be replaced, with 'Header Image' as the description. The 'With File' column has a dropdown menu with a green refresh icon to its right. In the top right corner of the main area, there is a 'Communications' dropdown menu and two arrow icons.

- j) Select the **Portal and RSS** heading in the **Form Navigation Panel**. If publishing the communication via your customer portal or by RSS define the following properties:
- **Category.** Select the category under which the communication will appear. There are a choice of the following:
 - **General**
 - **News**
 - **Offers**
 - **Kids**
 - **Team News**
 - **Advert**
 - **Title.** Enter the title of the communication.
 - **Body.** Enter the “teaser” text that will be displayed to customers.
 - **Image.** Select the image to be displayed.
 - **Read More Page.** Select the communication page that readers will click-through to.
- m) Select the **Notes** heading in the **Form Navigation Panel**. Enter any additional information relating to the communication.
- n) Select **Save** on the ribbon.

5.2. FORMATTING ATTRIBUTES

When adding attributes to the communication in the HTML editor there are a number of formatting rules that must be followed. The tables below demonstrate the formats that must take place when formatting outputs for Dates, Numbers and Currency:

Formatting Output Dates:

When formatting output for Dates use. Note the difference between the upper and lower case lettering.

d = Day

M = Month

Y = Year

H = Hour

m=minute

s=second

Symbol	Example date	Output
d	01/02/1965	1
dd	01/02/1965	01
ddd	20/01/1965	Wed
dddd	20/01/1965	Wednesday
M	20/01/1965	1
MM	20/01/1965	01
MMM	20/01/1965	Jan
MMMM	20/01/1965	January
yy	20/01/1965	65
yyyy	20/01/1965	1965
H	20/01/1965 01:54:32	1
HH	20/01/1965 01:54:32	01
m	20/01/1965 01:54:32	54
mm	20/01/1965 01:54:32	54

s	20/01/1965 01:54:32	32
ss	20/01/1965 01:54:32	32
ddd, dd MMM yyyy HH:mm	20/01/1965 01:54:32	Wed, 20 Jan 1965 01:54

Formatting Numbers:

When formatting Numbers use:

Symbol	Example Number			Output		
0	1234.5678			1234		
0.0	1234.5678			1234.6		
#,##0.00	1234.5678			1,234.57		
It is possible to set different formats for positive, negative and zero values						
Combined Symbols	Positive number	Negative number	Zero	Positive output	Negative output	Zero output
#,##0.00;(#,##0.00);0	1234.5678	-1234.567	0	1,234.57	(1,234.57)	0

Formatting Currency:

When formatting Currency use (or use number formatting)

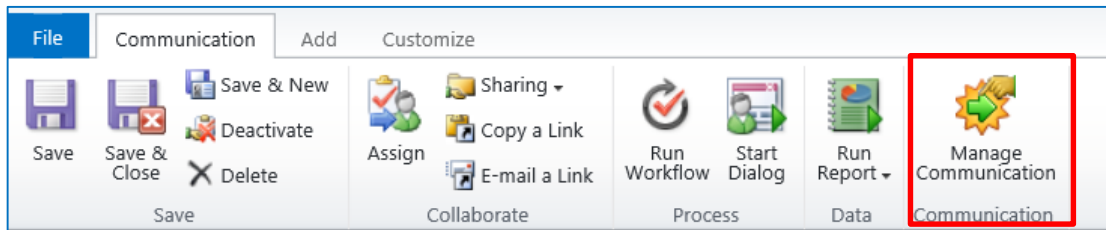
The C will put the correct currency symbol for the locale

Symbol	Example Number	Output
C	1234.5678	£1,234.57

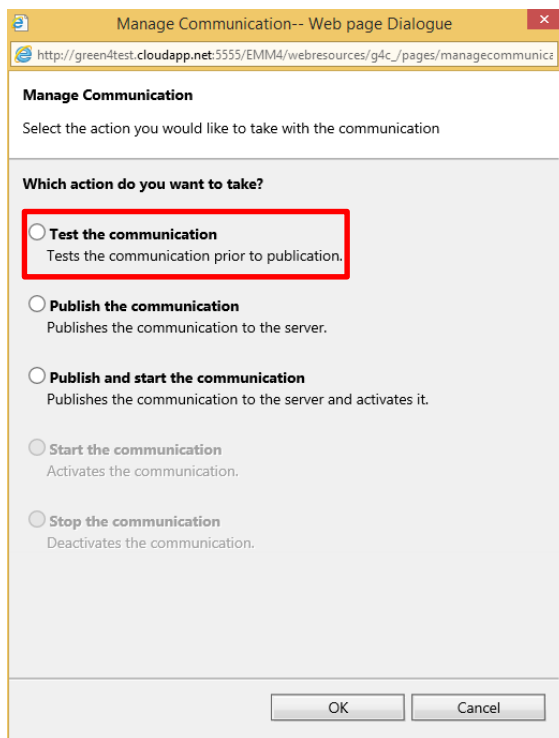
5.3. TESTING THE COMMUNICATION

Before you issue your communication to your target audience it is advisable to thoroughly test the materials. In some circumstances materials added through the HTML editor may appear correctly, but once the email is sent to an inbox it may render incorrectly, modifying the content may be required and multiple tests may be necessary to resolve any rendering issues. To run a test communication:

- a) With the communication open select **Manage Communication** on the ribbon.



- b) The Manage Communications dialog will be displayed. Select **Test the Communication** followed by **OK**.



- c) The Test Communication will be sent to the email address that has been entered in the Test Address field.
- d) Check the communication materials sent to the test email address.

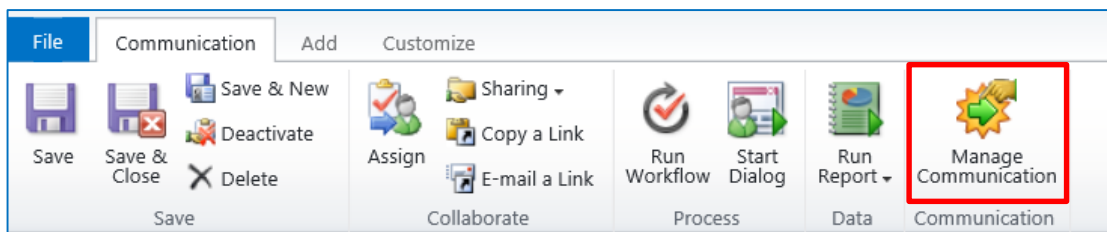
5.4. STARTING THE COMMUNICATION

Once you are satisfied with the appearance and content of the communication you can run the live communication. Running a live communication is a two stage process: **Publish** and **Start**.

Stage	Definition
Publish	By publishing a communication, the email gets sent to Green 4 Solutions servers and is ready to be 'started' at the time and date previously set on the communication form.
Start	By starting a communication, you are setting the email to be sent to recipients email addresses at the time of the 'start date' on the communication form.

To run a live communication:

- a) With the communication open select **Manage Communication** on the ribbon.



- b) The Manage Communication dialog will be displayed. Select one of the following options:
 - **Publish the Communication.** Select to publish the communication but not issue materials to customers. This option should be used for time-critical communications, as there will be no delay in the sending of communication emails whilst materials are published to the server. Once the communication has been published it will be necessary to return to the Manage Communications dialog and select **Start the Communication** once you are ready for the communication to be issued to recipients.
 - **Publish and Start the Communication.** Select to publish and start the communication in a single action.

6. STATISTICS AND REPORTING



Sending email communications directly from the CRM system enables a closed loop approach to an organisation’s marketing.

During the running of an Ecommunication the pages visited by audience members are recorded using click stream analysis. This analysis can be used to audit the success or failure of the communication campaign. In addition the audit information collected can be used to build a profile of each user’s interests. Through profiling the outcome of previous Ecommunication campaigns, you can further refine your audience member selections ensuring improved targeting of future Ecommunications.

Once the email has been sent, statistics can be used to see how successful the campaign which can then be used to inform future campaigns, ensuring continual improvements. It is usually recommended that statistics and ROI be reported on 7 days following the publishing of a communication, allowing time for recipients to open, click or purchase on the back of the email.

Statistics can be used to report on the following recipient interactions with an email:

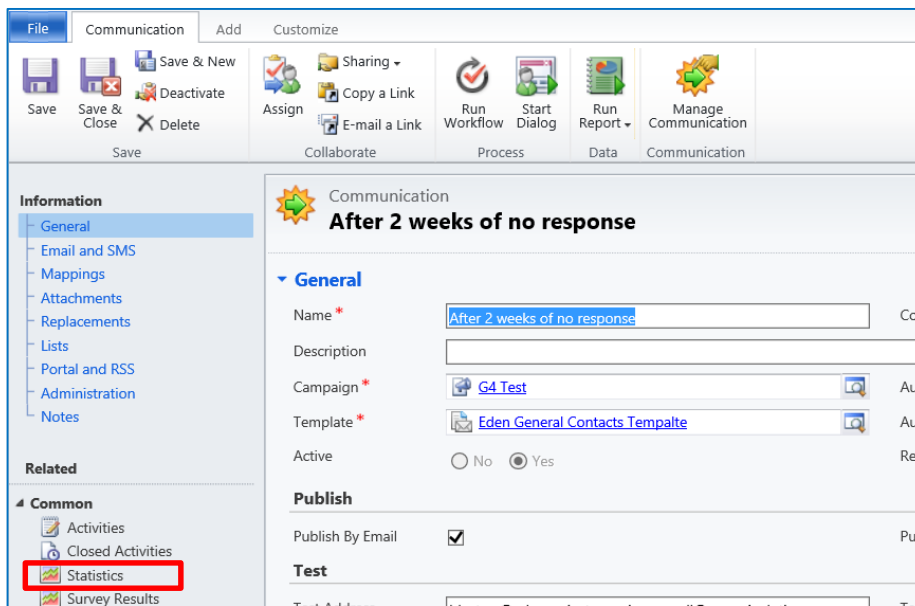
- **Actual number of emails sent**
- **Email opens**
- **Email Clicks**
- **Unsubscribes**

Reporting on the successes and failures of email campaigns not only gives users the opportunity to improve on future campaigns, but also measure the success in terms of ROI. For example, following a campaign advertising match tickets – a user may try to analyse the contacts who clicked on a particular story, and then went on to buy the ticket advertised in that story.

6.1. ACCESSING STATISTICS

To access statistics for a certain communication in Microsoft CRM:

- a) In the **Marketing Area** of Microsoft CRM, select **Communications**.
- b) The Marketing Lists View will be displayed. Select the **communication** you want to report on, double click to open.
- c) The Communication form will now open.
- d) Under the common menu on the left hand toolbar select **Statistics**.



e) This will display the Statistics linked to the email for example:

- **Publish Progress.** This displays the number of emails that have been published.
- **Email Progress.** This displays the progress of the emails that have been sent. It is possible to see if any emails have failed to send or been suppressed here.
- **Email bounces.** This displays if any emails have bounced.
- **Web Page Hits.** This displays if any web pages have been hit as a result of the email being sent.
- **Click Throughs.** This displays if any click throughs from the email to a linked page have occurred.

