Customer Mailing

When you select this option from the Occasional Menu, a screen like the one shown below will appear.

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Touch **Main Menu** to return to the Occasional Menu from this screen.

This section of the program allows you to print address labels to selected, or to all, customers. When you first use the program, the screen above will only contain the word “LABELS”. As you go on to create letters to customers, the titles of those letters will be listed underneath.

When you use this section for mailing, you must first select labels. Once you have done this, the process of selecting customers is the same for both labels and letters. Creating and amending letters will be described later in this section.

If you want to print address labels, touch and highlight **LABELS** on the screen above and then touch **Next >>**.

The screen will change to one with a series of tabs across the top. Each tab represents a common reason for selecting customers before printing address labels. The final tab, headed **More**, allows you to be even more selective. Touch the tab at the top to move to each selection screen.

The first screen on display, headed **New Customers**, has the words “Added Since” followed by a date field. If you enter a date in this field, the program will select only the customers who have been added to the system since that date.

The second tab, headed **Lapsed**, has the words “Not Ordered Since” followed by a date field. If you enter a date in this field, the program will select only the customers who have not placed an order since that date.

The next tab, headed **Lazy**, has two sets of words and fields; “Since” followed by a date field and “Ordered Less than” followed by a blank field. If you enter a date in the first field and a number in the second blank field, the program will select the customers who have ordered less than that number of times since the date that you entered; e.g. ordered less than three times in the last six months.

The next tab, headed **Best**, also has two sets of words and fields; “Since” followed by a date field and “Ordered More than” followed by a blank field. If you enter a date in the first field and a number in the second blank field, the program will select the customers who have ordered more than that number of times since the date that you entered; e.g. ordered more than twenty times in the last six months.

The final tab, headed **More**, allows you to be even more selective when choosing a list of customers for a mailing. When you touch this tab, the screen shown below appears.

The screen on the **More** tab allows you to select customers according to their activity, or inactivity, between dates and also by using more than one criteria at the same time.

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When you touch the drop down arrows on the right hand side of the fields on this screen, the program offers you the choice of “Spent More Than”, “Spent Less Than”, “Ordered More Than” and “Ordered Less Than”.

The easiest way to describe the use of this screen is to give examples.

If you enter “01/01/01” in the **Between** field and “31/12/01” in the **and** field, select “Ordered More Than” from the drop down list and enter “20” in the blank field, all on the top line, the program will select customers who ordered more than 20 times in 2001.

The second line will work in conjunction with the first line; in other words customers who fulfil one set of criteria and also fulfil a second set.

For example, if you complete the top line as above and then on the second line, enter “01/01/02”, then “31/03/02”, then “Ordered Less Than” and finally “3”, the program will select customers who ordered more than 20 times in 2001 but who have also ordered less than 3 times in the first three months of 2002. In other words, customers who used to order regularly but are no longer doing so.

The **Postcode** and **Zone** fields allow you to either narrow the selection of customers made on the line(s) above even further by restricting them to a particular postcode sector or zone, or you can ignore the fields above and just use these fields to select and mail to everyone in a postcode or zone.

If you touch **Cancel** on this screen, the program will return to the Occasional Menu.

Once you have selected the customers for whom you want to print address labels on one of the screens described above, touch **Next >>**.

*If you ever want to print address labels or letters to all customers on the system, do not make any selections on any of the screens described above and simply touch **Next >>**.*

inTouch will now display the message “Loading Please Wait” at the foot of the screen with a progress bar and will also show the total number of customers selected so far in the bottom left corner. When all the selected customers have been loaded, **Cancel** and **Print** buttons will replace the message at the bottom of the screen.

Touch **Cancel** at anytime whilst the customer list is loading to stop the process and return to the Occasional Menu. Touch **Cancel** when the list has fully loaded to clear the screen and return to the Occasional Menu.

The customer list has columns showing their Phone Number, Name, Address, the date of their Last Order, the number of Orders they have made and their Zone. When the list is too long to fit on one screen, a scroll bar appears at the right hand side, enabling you to scroll down and back up the list.

At this point, if you touch **Print**, the program will print labels (or letters) to all the selected customers. However, you can also choose to remove customers from the list or to edit the details of individual customers.

To edit the details of a customer, touch that customer’s line on the list. The program takes you to a screen showing the full details recorded for that customer. If you touch **Edit Customer**, inTouch will allow entry to the Name, Address, Postcode, Telephone Numbers and Zone fields.

To amend any of the details shown on this screen, touch the field that contains the information to be altered, delete the old text and type the new in it’s place. Touch **Save Changes** to return to the list of customers.

To remove customers from the list to be mailed, touch and clear the Print check box on the left hand side of the line of each customer on the list. Touch **Print** when you are ready to print labels for the modified list.

*When you touch **Print**, the standard Windows Print Setup box will appear on screen. The address labels or letters will be printed on your default report printer. Touch **OK** to continue and print or **Cancel** to stop. Touch **Properties** if you need to amend any of the printer details shown.*

If for any reason your print run of labels or letters is interrupted and the print job in Windows has been cancelled, you can restart printing from a specified point in a list. Select the same list of customers again by using exactly the same criteria as before and, when the list is displayed on screen, scroll down the list and right click on a name at the point where you would like the printing to start again.

The message below will appear. If you touch **Yes**, the Print check boxes for every customer above this point will be cleared. Touch **No** to return to the (unaltered) list.

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Touch **Print** when you are ready to print labels for the remainder of the list.

inTouch is set up to print address labels on Avery 7160 A4 labels sheets.

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