sesame®

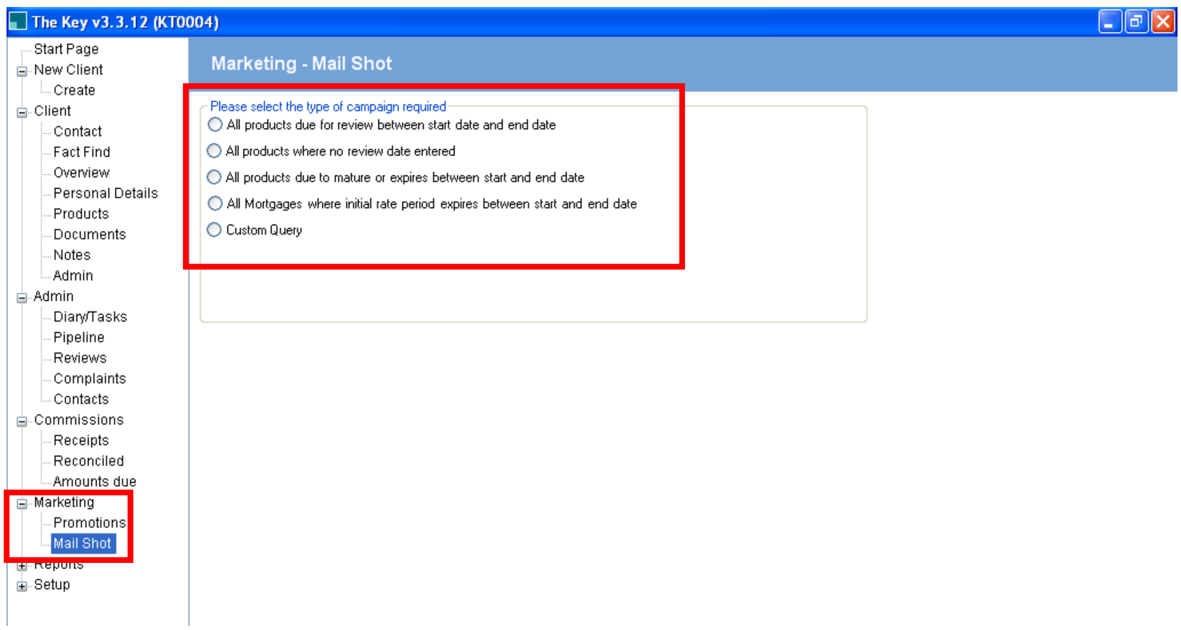
Using the Marketing Mail Shot area

the key

The purpose of this guide is to explain how the Marketing Mail Shot area can be used to produce mail shots based on client and product data in the Key. The guide will cover the following:

- Creating a mail shot using a pre-defined query
- Creating a mail shot using a custom query
- Creating a mail merge document
- Creating a letter mail shot
- Creating an e-mail mail shot

The **Mail Shot** function can be found within **Marketing** > **Mail Shot** area of the Key as shown below:



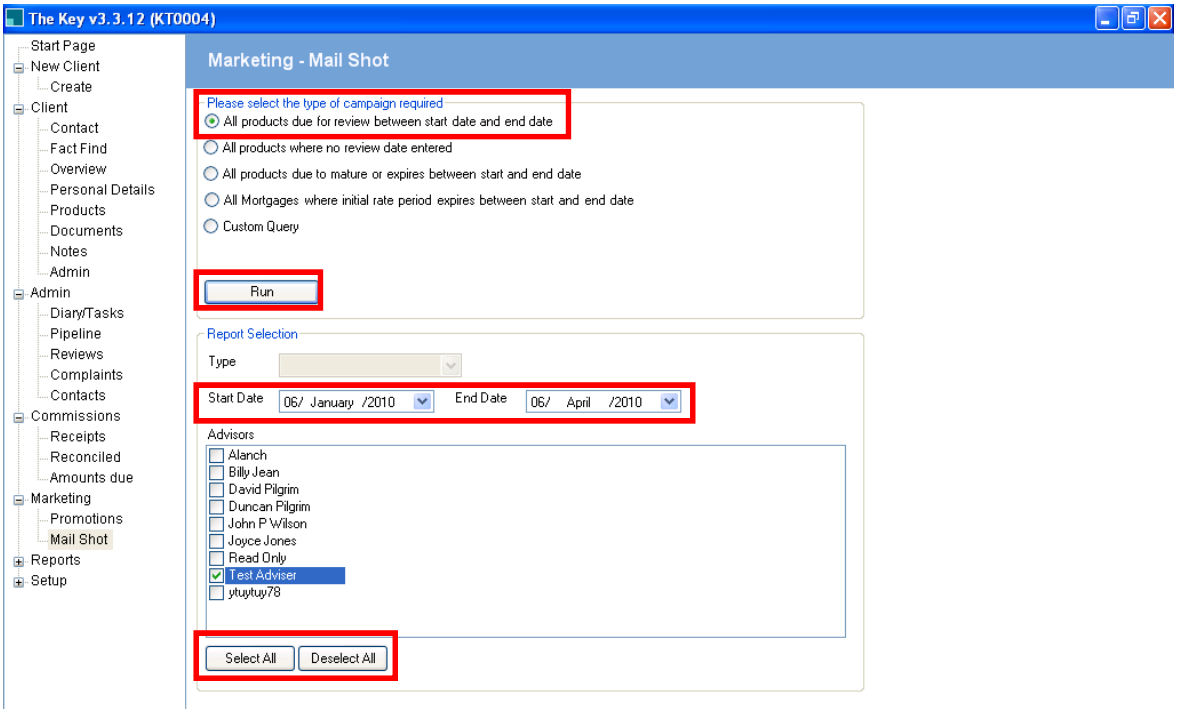
Click on **Mail Shot** and a list of options will be displayed. The first 4 queries listed are pre-defined queries and the Custom Query option lists any reports that have been created through the **Ad-hoc** Reporting function.

Creating a mail shot using a pre-defined query

There are 4 pre-defined queries as shown above which use data stored against relevant products within the Key

Query Name	**Product Field used**
All products due for review between start date and end date	Next Review Date
All products where no review date entered	Next Review Date (where field is blank)
All products due to mature or expire between start and end date	End Date
All mortgages where initial rate period expires between start and end date	Initial Rate Expire Date

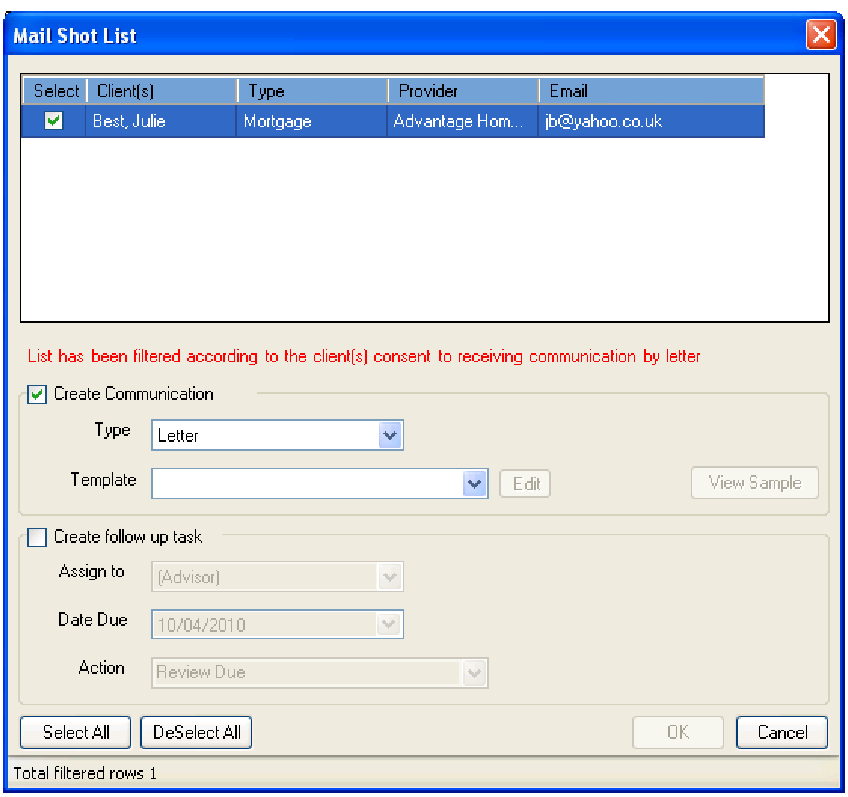
To run a query select the required option by clicking the radio button. This will display a Report Selection box where the date range and specific advisers can be selected to include in the mail shot



The required date range can be selected by either over-typing the displayed dates or by using the drop-down arrows and using the Windows calendar function.

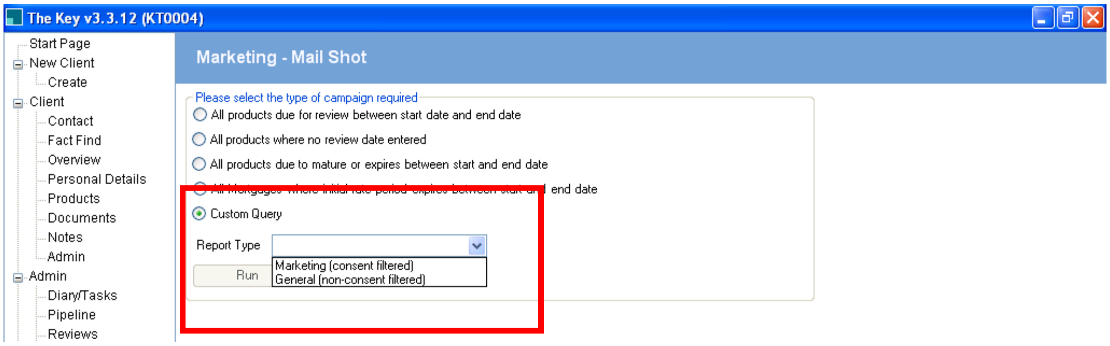
The required advisers can be selected by using the **Select**/**Deselect All** options or by manually ticking the relevant advisers.

Click on **Run** and a Mail Shot List will be displayed showing clients who match the selected criteria.



Creating a mail shot using a custom query

Select the **Custom Query** option by clicking the radio button.

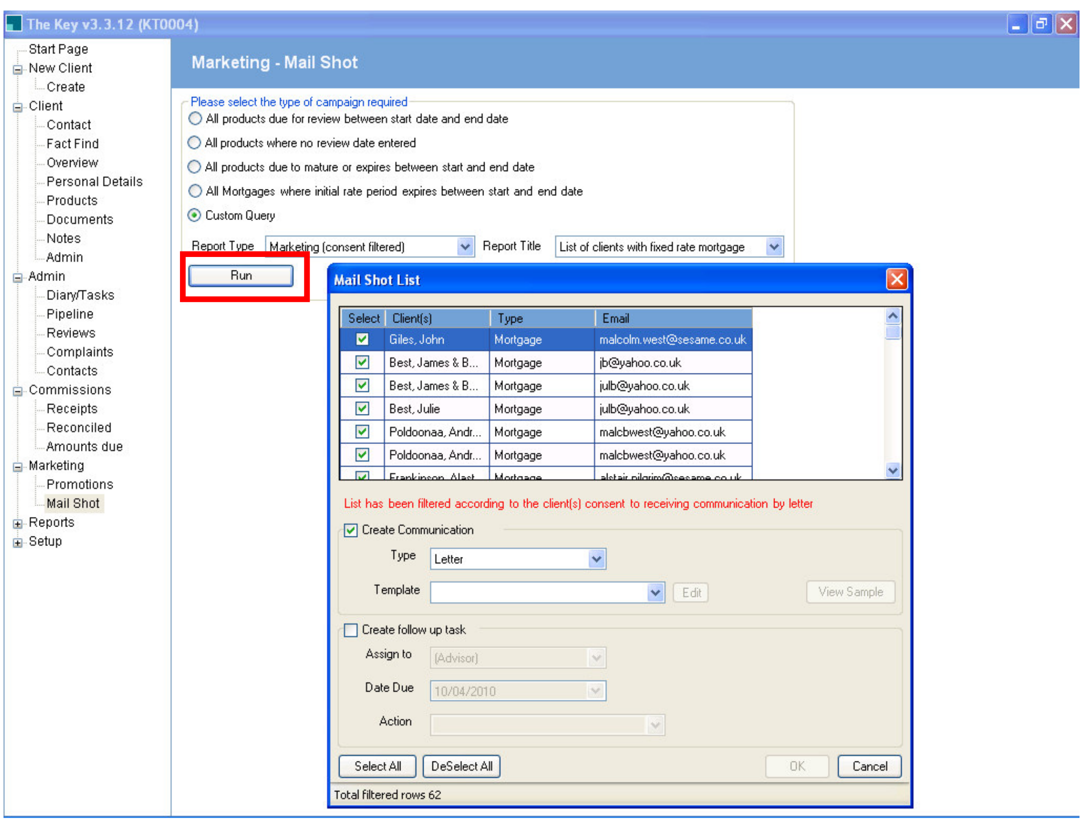


A Report Type box will be displayed where two options are listed:

Marketing Consent (filtered)	Reports created using the **By Applicant** function of Ad-hoc reporting which have been saved into the **Saved Marketing Reports** folder. Data Protection filters set on the **Client > Contact > Additional Information** tab will be applied
General (non-consent Filtered)	Reports created using the **By Applicant** function of Ad-hoc reporting which have been saved into the **Saved Reports** folder. Data Protection filters set on the **Client > Contact > Additional Information** will **not** be applied

Further guidance on creating Ad-hoc Reports for use in the Marketing area can be found in the **Using Ad-hoc Reporting** user guide.

Select the required **Report Type** and **Report Title** then select **Run** and a Mail Shot List will be displayed showing clients who match the selected criteria.



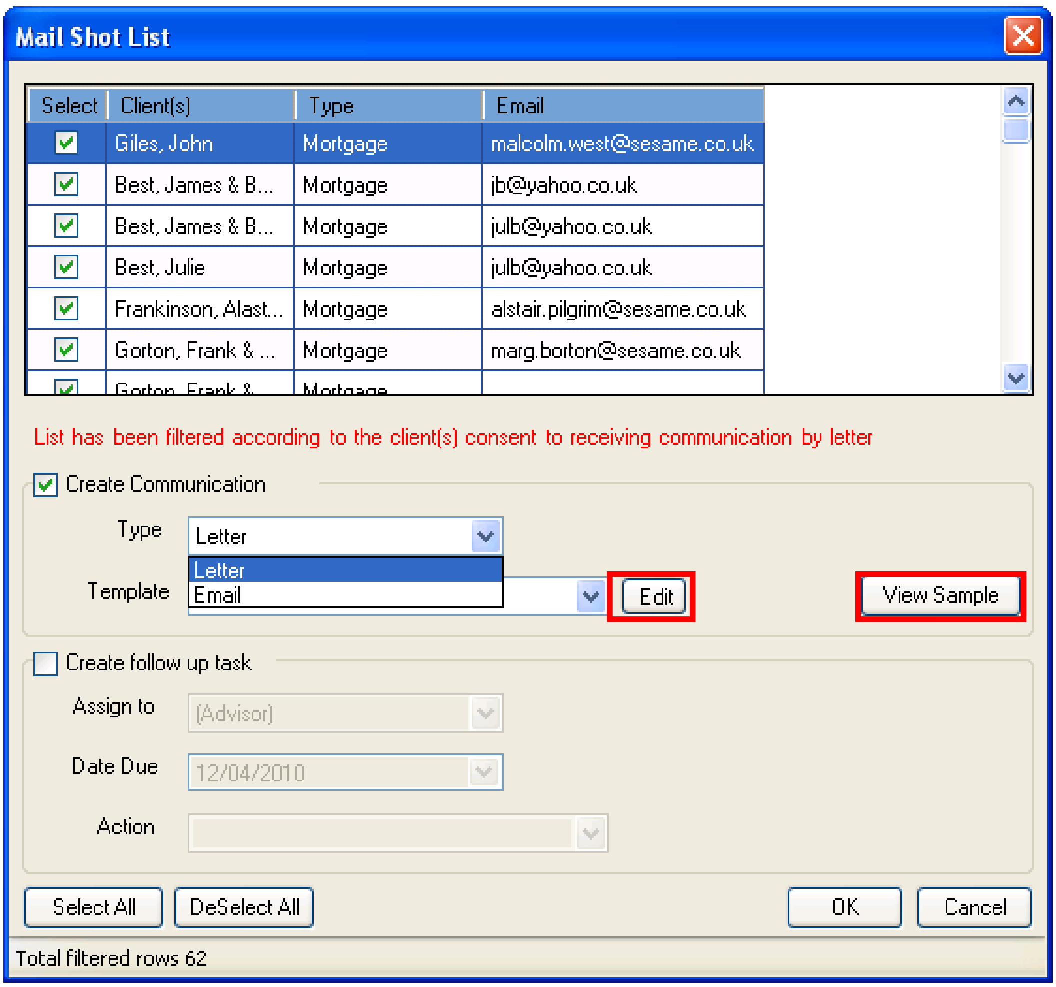
Creating a mail merge document

A mail merge document can be created in the Setup > Letters area. General guidance on how to create a mail merge letter and the addition of merge fields can be found in the Document Management User Guide.

NB: specific mailshot merge fields (labelled “mailshot.fieldname” will need to be added into the required template to ensure the letter is addressed correctly. A sample template letter including standard mailshot merge fields is available at http://www.thekey.uk.com/sesame_thekey.aspx. Further fields can be added into the selected template letter by clicking on the edit button below.

Where a product is held in joint names the mailshot will produce a separate letter for each holder.

The Mail Shot list can be amended to remove any duplicate clients. The **Select/Deselect All** buttons can be used to bulk select or deselect clients for inclusion in the Mail Shot.

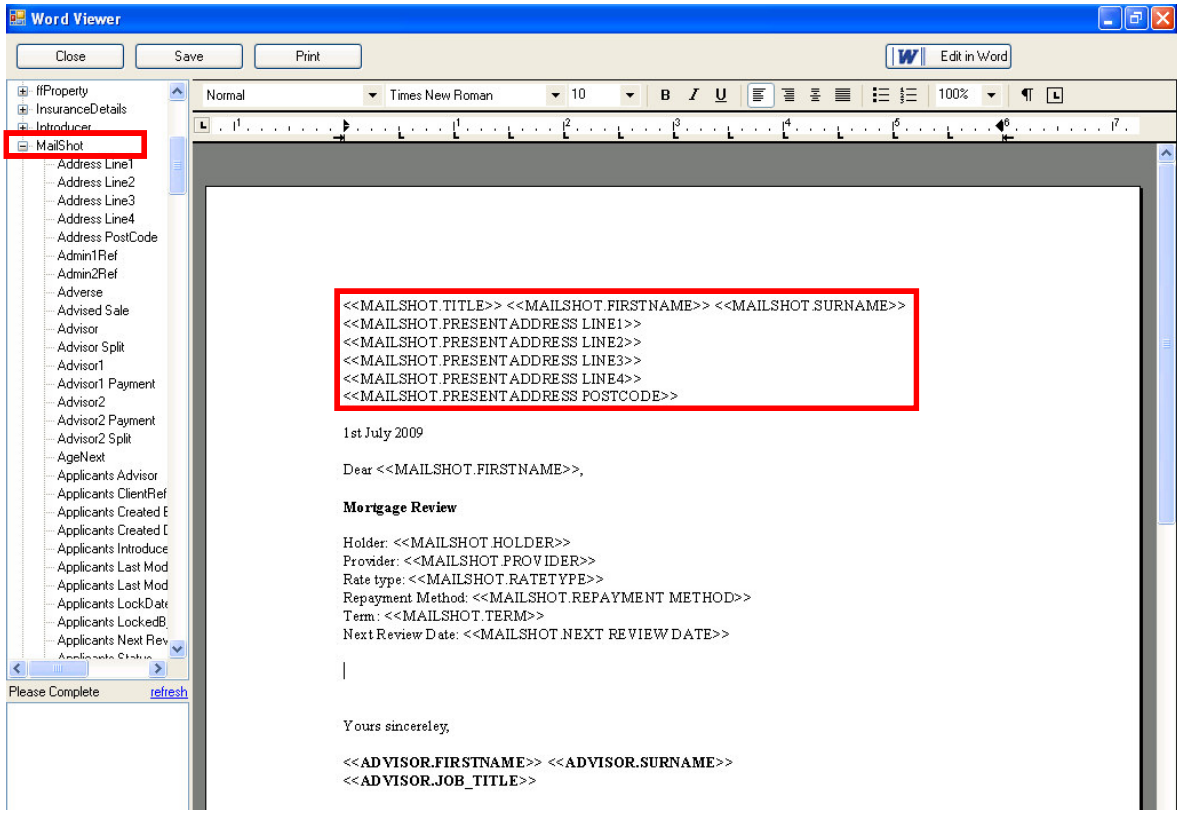


Create Communication

Type – Select from Letter or Email. If Email is selected the appropriate letter template will be embedded into an e-mail message

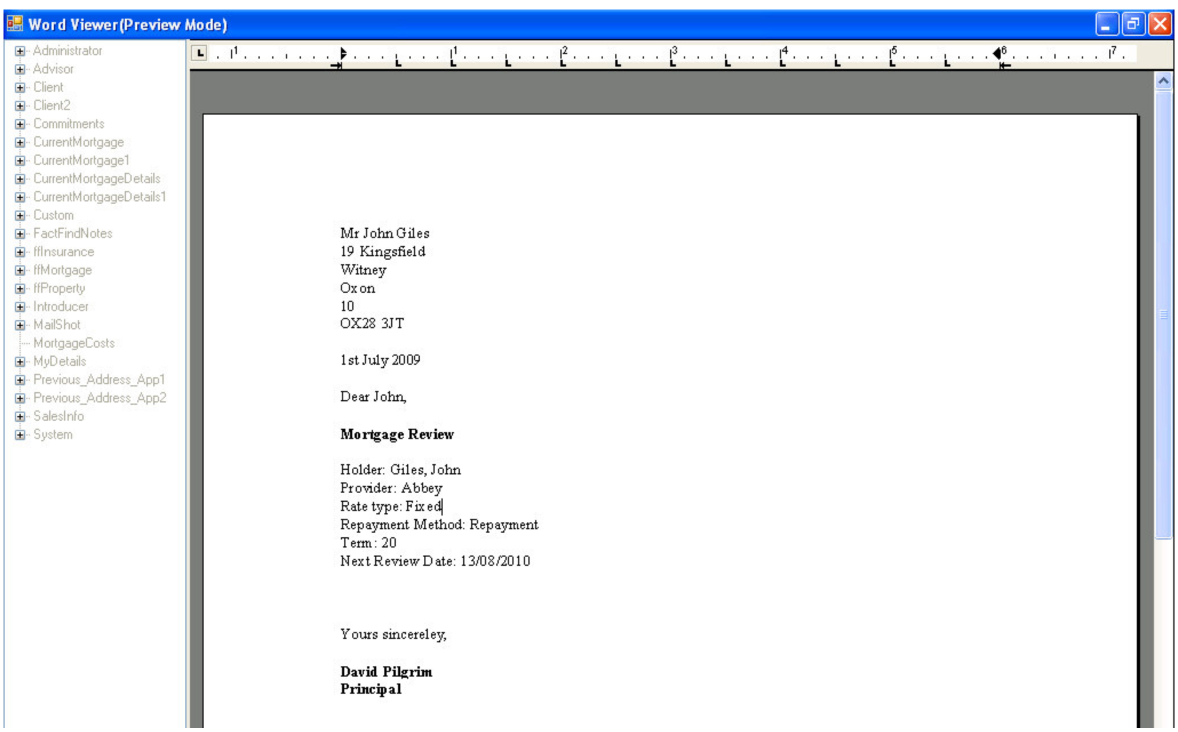
Template - select the document to be used from the list of available templates. This will list branch owned templates and those created by Sesame

Edit – Any branch owned templates can be edited as required. NB: Templates created by Sesame cannot be edited. Click on **Edit** to review the letter to be issued which will display the letter in Word Viewer and will enable the letter to be viewed and amended as appropriate. The screen shot below highlights example “mailshot” merge fields which can be used within the template letter.



Click on **Close** and **Save** to save any amendments that have been made.

View Sample – a sample of the mail shot communication including completed merge fields can be viewed.

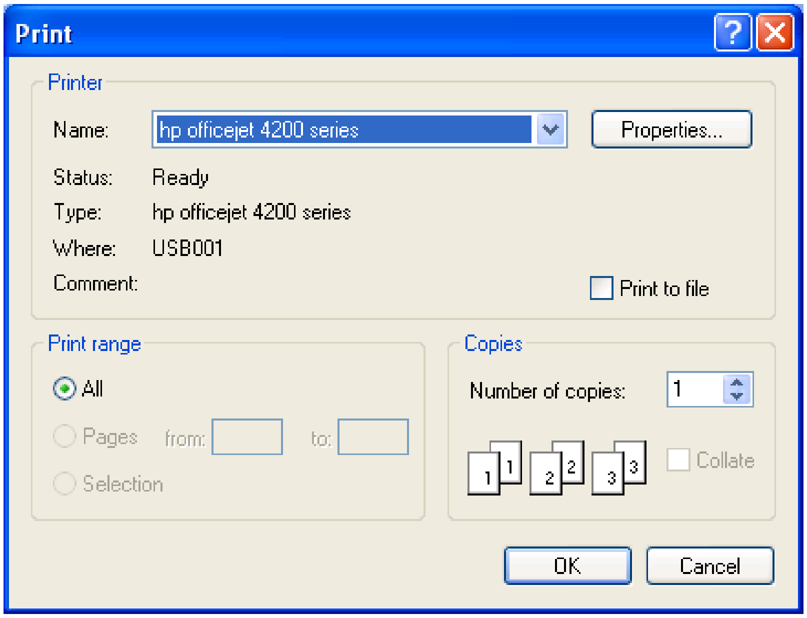


Create follow up task – tick the box to create a task for a specific adviser or other user. This task will appear in the user's **Admin > Diary/Tasks** area.

When the required template has been selected and reviewed and any associated task has been created click on the **OK** button. The resulting screen will differ depending whether a Letter or Email communication has been selected.

Creating a Letter Mail Shot

When OK has been selected a print dialogue box will be displayed.

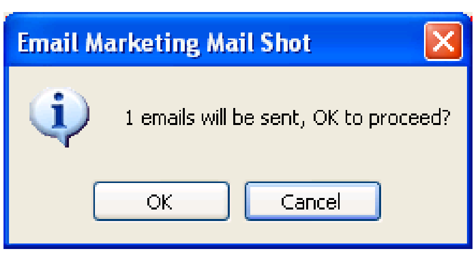


Click **OK** and the selected mail shot letter(s) will be sent to the printer. A copy of the letter will also be stored in the relevant **Client > Documents** area.

NB: where a group mailing is to be undertaken it is recommended that a test mail shot is first created using a single client to check the accuracy of the printed communication.

Creating an E-mail Mail Shot

When OK has been selected a confirmation box will be displayed confirming the number of e-mails to be issued.



Click **OK** to proceed and follow any on-screen instructions. These will differ depending on the version of Outlook being used and any internal security settings. When complete a confirmation box will be displayed and a copy of the email(s) will be stored in the relevant **Client > Documents** area. A copy of the e-mail will also be stored in Outlook in the Sent items folder.