

October 2011

Tip of the Month

Targeting Prospect Customers in Marketing Campaigns

Identifying contacts as potential prospects within the IntelliDealer Customer Profile is easy, and it's something you should consider doing in order to build a complete contact list that represents your customer base—both current and potential. Once you have customers loaded with the "Prospect" status, you can use IntelliDealer's Marketing Campaigns to segment your contacts and market to them directly.

- When adding a new customer into IntelliDealer, set the Customer Status radio button to "Prospect" (Figure 1).

Figure 1

Add Customer

Customer Status: Active Prospect

Category: Business Individual Internal Related

Customer Number: FSMITH11

Miscellaneous Customer:

Name: Frank Smith

Address: 138 Main Street

City: Springfield

Country/Prov/State: US/CA

Zip/Postal Code: 90312

Territory:

Contact:

Search 1: SMITH

Search 2:

Do Not Call:

Business Phone Number: 555 5555555

Business Fax Number: 5555555551

Business Cell Number: 5555555552

Business E-mail Address: fsmith@bigffarms.com

Web Address: www.big-f-farms.com

Comment:

Location: 01

Salesperson: JSM

Preferred Language: English

Discount: No Disc Assigned

Pricing Group: DEALER

Tax 1: Add 5% To List

Tax 2: Tax Code Required

Tax 3:

Tax 4:

County:

Size:

Mandatory Save Close

- In an existing Customer Profile, select "Prospect" from the Status drop-down list (Figure 2).

Figure 2

The screenshot shows a web-based form for a customer profile. The title bar reads "Customer Profile - FSMITH11" and "Added: 10/07/2011 Modified: 10/07/2011". The form is divided into several sections:

- Category:** Radio buttons for Business (selected), Individual, Internal, and Related.
- Name:** Frank Smith
- Address:** 138 Main Street, Springfield, CA
- Zip/Postal Code:** 90312
- City:** Springfield
- Country/Prov/State:** US/CA
- County:** 017
- Contact:** SMITH
- Search 1:** SMITH
- Search 2:** (empty)
- Do Not Call:**
- Business Phone Number:** 555 5555555
- Business Fax Number:** 5555555551
- Business Cell Number:** 5555555552
- Business E-mail Address:** fsmith@bigffarms.com
- Web Address:** www.big-f-farms.com
- Comment:** (empty)
- Status:** A dropdown menu with "Active" selected, "Deleted" below it, and "Prospect" highlighted in blue. A red box is drawn around this dropdown.
- Location:** Active
- Salesperson:** (empty)
- Preferred Language:** English
- Terms:** C.O.D.
- Tax 1:** Add 5% To List
- Tax 2:** Tax Code Required
- Tax 3:** No Tax
- Tax 4:** No Tax
- Discount:** No Disc Assigned
- Pricing Group:** DEALER
- Pricing Level:** No Level Assigned
- A/R Type:** Open Item
- Late Charge:** Y
- Print Parts Invoices:** Yes
- A/R Statement:** Yes
- Statement Message:**
- Statement Combination:** (empty)
- PO Number:** (empty)
- PO Expiry:** (empty)
- P.S.T. Number:** (empty)
- F.S.T. Number:** (empty)

At the bottom of the form are "Save" and "Close" buttons.

To create a Marketing Campaign directly targeting your Prospects, ensure you select the proper criteria in Campaigns.

- In Marketing Campaigns, select a target group by selecting option 1: Customer Profile (Figure 3).

Figure 3

Campaign - PROSPECTS - Spring sale for prospects

Select: **1. Customer Profile**
 2. Call History
 3. Equipment Owned
 4. Outstanding Accounts Receivable
 5. Fiscal Purchase History
 6. Contacts
 7. Customer Omission

Description/Subject:

Not marketed within: days, via: E-mail Letter Fax Label Merge File

Contact Method: Create call entry:

Category: Reason: Salesperson:

Method: E-mail Letter Label Merge File

Form:

From:

Buttons: Save, Delete, View Selects, Continue, Close

- In the Selection Criteria window, add a field by clicking on the Search (magnifying glass) icon (Figure 4), then select the Status link in the description column to add the CUSTA field to your Selection Criteria (Figure 5).

Figure 4

Selection Criteria

Group: Field: Operator: Value:

Buttons: Save, Save / Exit, Close

Figure 5

Select Field			
Description	Field	File	Library
Status	CUSTA	CMASTR	QS36F
Customer Number	CUCUS	CMASTR	QS36F
Branch	CUBR	CMASTR	QS36F
A/R Type	CUART	CMASTR	QS36F
Category B-buss,I-ind,N-internal	CUCAT	CMASTR	QS36F
Business Classification	CUCLS	CMASTR	QS36F
Sold To Customer Name	CUNME	CMASTR	QS36F
Sold To Address 1	CUAD1	CMASTR	QS36F
Filler	CUFILC	CMASTR	QS36F
Province/State	CUPRV	CMASTR	QS36F

- After identifying the Status field as the Selection Criteria you wish to use, ensure that the operator is set to "Equal To", and the Value is set to "X" (Figure 6). Then click the "Save" button.

NOTE: The value "X" identifies those contacts loaded in your customer profile with the Customer Status of "Prospect". Other available values include: "BLANK" (Active customers), "A" (Active customers) and "D" (Deactivated customers).

Figure 6

Selection Criteria

Group: A Field: CUSTA Operator: Equal To Value: X or Spaces: +

- Once you've saved your Selection Criteria, you will continue running the Campaign. IntelliDealer will display the list of selected customers (Figure 7), and you will be given the opportunity to manually remove any prospects you don't wish to contact by placing a check in the "Omit" checkbox. You can then complete this Campaign by clicking the "Run" button.

Figure 7

Customers						Results to display: 10
Customer Name	Customer Number	Address Line 1	Phone Number	E-mail Needed	Omit	
RUSSELL BARTLETT	0475453700	R.R. #5	5554754537	No	<input type="checkbox"/>	
PAUL LAIDLAW	0686300400	451 DINGMAN DR.	5556863004	No	<input type="checkbox"/>	
Frank Smith	FSMITH11	138 Main Street	5555555555	No	<input type="checkbox"/>	

(1 - 3 Of 3)

Request More Information

For more detailed descriptions and instruction, please consult the IntelliDealer Online help module, or contact PFW Client Services at 877.289.2670, or e-mail support@pfw.com.