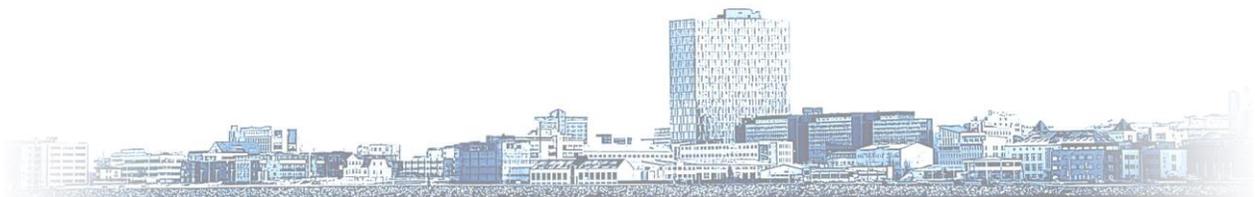




LS Retail

Targeted E-Mail Memo

LS Nav 2015 (8.0)



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1 Introduction

1.1 Introduction to Targeted E-Mail in LS Nav

This is the first version of LS Nav that has the ability to send out targeted e-mails. Both **Published Offers** and **Member Notifications** now have an action that allows the user to send information about the offer/notification to members. On a **Published Offer** the e-mail is sent to members who match the filtering criteria that is set on that particular **Published Offer**. For **Member Notifications** the user can select to filter on *Club* or *Scheme* as well as the attributes that are set up in the system.

The standard SMTP Mail Setup in NAV has to be set up correctly in order for the e-mails to be sent out.

The e-mail will consist of subject (Primary Text), body (Secondary Text), sender (Username in SMTP setup), disclaimer and attachment (Picture). If a web link has been added to the offer/notification, it will be located under the body but before the disclaimer.

It is also possible, on the **Published Offer/Member Notification** page, to have the e-mail personalized. If this is selected, the first line of the body could be:

Dear [Member name]:

***Note:** Sending personalized e-mails can take more time because then each e-mail is sent separately instead of the “one-size-fits-all” method when they are not personalized.*

Sending HTML e-mails is also possible. With *Send HTML* selected, the user can type or copy html text into the **HTML** text box on the **Published Offer** or the **Member Notification** and the message will then be sent as HTML in the e-mail.

The e-mail disclaimers and e-mail log are located under **LS Retail > Sales & Marketing > Social Media and Targeted E-Mail** and **LS Retail > Member Management > Member Management > Social Media and Targeted E-Mail** in BackOffice. There, the user can create the disclaimers required as well as reviewing the log for e-mails sent from **Published Offers** and **Member Notifications**.

2 Features

The basic functionality of the **Targeted E-Mail** is as follows:

- Send **Published Offer** directly to a group of members that are filtered according to the particular offer to be sent
- Send **Member Notification** directly to a **Member Club** or a **Member Scheme** via e-mail. Ability to filter down to **Attribute** and **Attribute Value**
- Creating custom **Disclaimers** that can be sent at the end of each e-mail
- Personalizing the e-mails sent so recipients don't feel the e-mail is spam
- Send HTML e-mails

3 Requirements

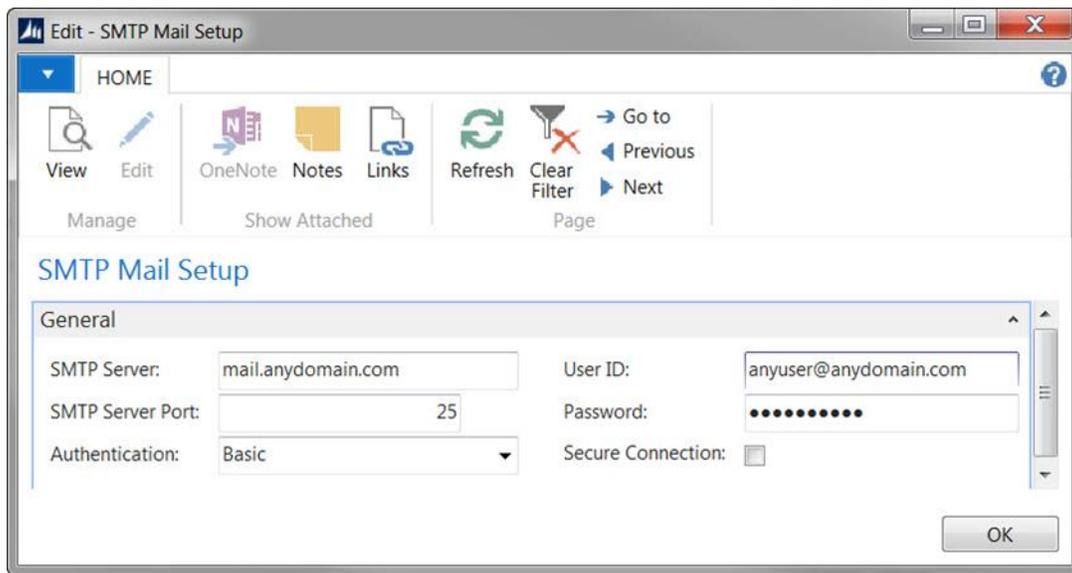
3.1 General

The Targeted E-Mail functionality is available in LS Nav 2015.

4 How to Use Targeted E-Mail in LS Nav

4.1 SMTP Mail Setup

The **SMTP Mail Setup** must have all the relevant fields filled out in order to connect to the correct mail server:



4.2 Published Offers and Member Notification

Targeted E-Mail can be sent directly from a **Published Offer** or a **Member Notification**. The marked fields that contain data can be used to construct the e-mail. The action is **Send Targeted E-Mail** in the **Process** group in the ribbon. The **Published Offer** factbox on the right side of the page shows information about what filters are used when sending to members.

In the **Options** FastTab the user structures the e-mails that will be sent.

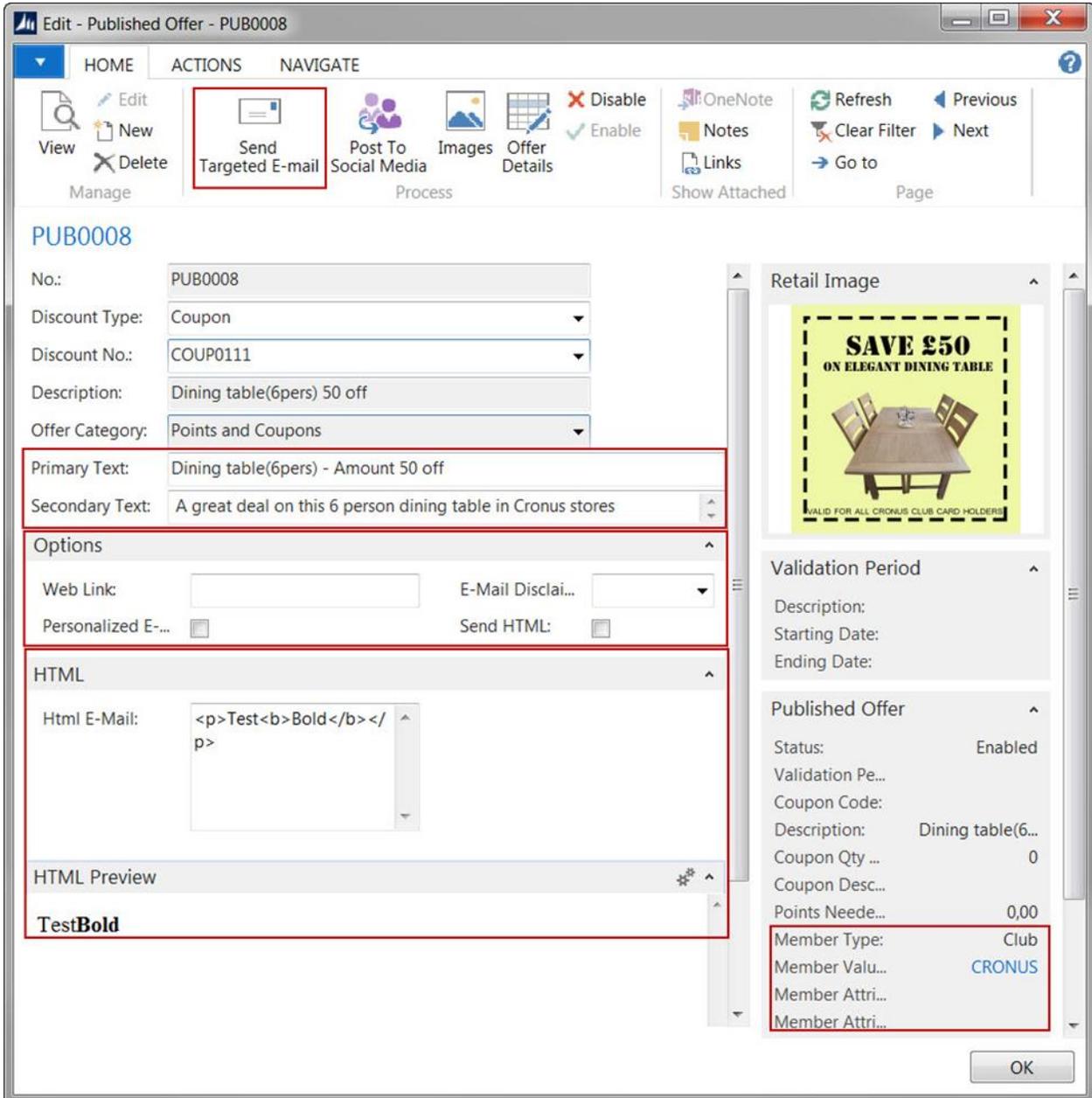
Web Link: If this is filled out a link to the URL will be added at the bottom of the e-mail body.

E-Mail Disclaimer: If a disclaimer is selected then the same disclaimer will be added at the bottom of the e-mail body. Below the **Web Link** if it is present.

Personalized E-Mail: With this checkbox selected, each e-mail will begin with: Dear [Name of Member]. Sending e-mails this way will be slower because each e-mail is sent separately instead of “one-fits-all” impersonal e-mails.

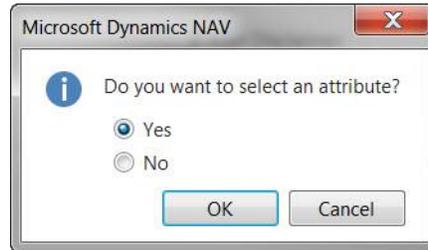
Send HTML: This changes the e-mail body. Instead of being constructed in **Secondary Text** box it uses the **HTML** box and enables the usage of HTML (Hypertext Markup Language) in the e-mails. The **HTML Preview** field will display the HTML as it will appear in the e-mail.

If the HTML format is used when sending e-mails, it is recommended to type the HTML code into the HTML box or copy/paste from a plain text editor or from a formal HTML editor. Copy/pasting from Microsoft Word or similar will add hidden tags to the HTML, which will take up space and make less room for text. Also, when using non-standard characters it is important to use *HTML Ampersand Character Codes* (for example " will produce the “(double quote) symbol).



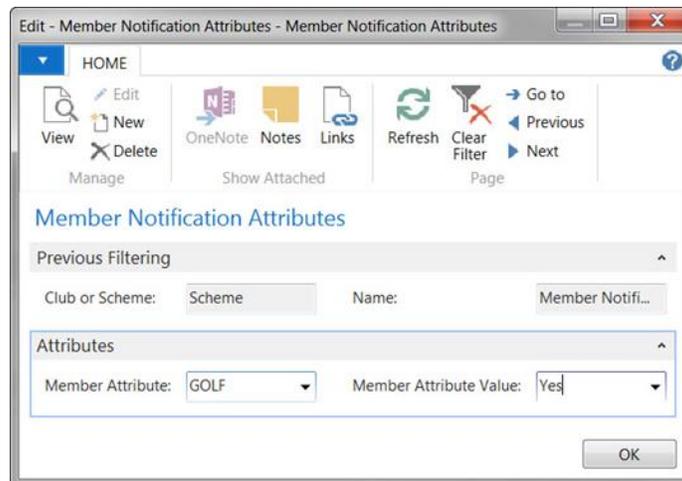
Member Notifications work in a slightly different way than **Published Offers** when sending **Targeted E-Mail**. The e-mail structure is the same but the filters are set up in a different manner as **Member Notification** does not have **Attributes**. **Member Club** or **Member Scheme** are selected on

the notification, but when the action **Send Targeted E-Mail** is pressed it triggers a question, whether **Attributes** should be used when filtering the e-mail list.



If **No** is selected, the e-mail is sent to the group that is filtered in the selection on the **Member Notification**.

If **Yes** is selected a **Member Notification Attribute** page opens where a **Member Attribute** and a **Member Attribute Value** can be selected and then used to filter the members further. When **OK** is clicked the e-mails are sent.



4.3 Targeted E-Mail Posting Log and E-Mail Disclaimers

A table contains information about the e-mails sent from LS Nav as well as a table for the disclaimers. They can both be accessed at the same locations in back office: **LS Retail > Sales & Marketing > Social Media and Targeted E-Mail** and **LS Retail > Member Management > Member Management > Social Media and Targeted E-Mail**:



The E-Mail disclaimers consist of **Code** and **Description**. They can then be selected on the offer/notification to be sent.

The E-Mail posting log is a way for users to see what has been sent and to whom.