SMART platform

User Manual
Version 2

Table of Contents

Impact Data - Home

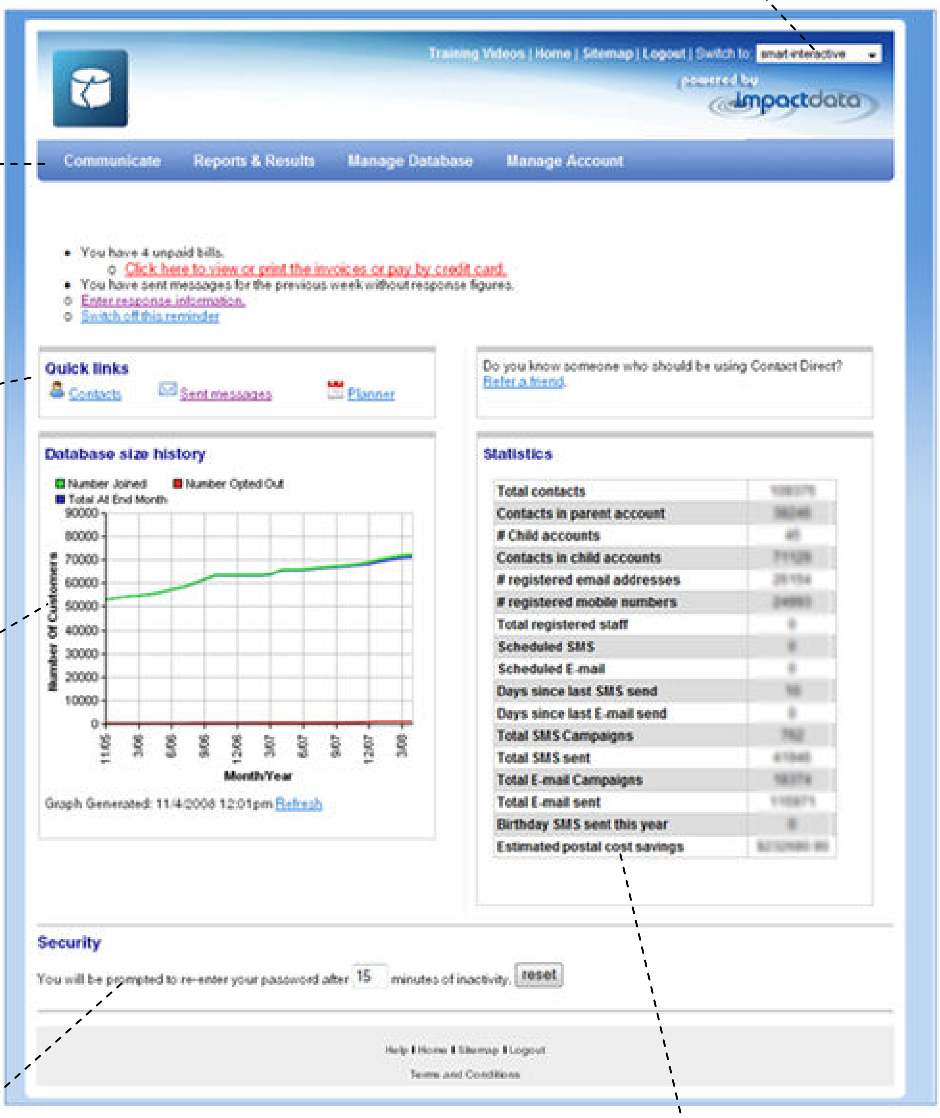
Welcome Screen Orientation

Product Switcher:
Allows you to switch between your SMART management or parent account interface (if applicable)

Menu:
Allows you to navigate through the platform.

Quick Links:
Navigate to your contacts, sent message log and planner.

Database Size History Graph:
View details of database growth and decline.



Security:
Set the minutes that the account may be inactive before prompted to enter a security password. The maximum inactivity permitted is 60min.

Statistics:
Database statistics including number of contacts, days past since campaigns and total communications sent as well as child account details (if applicable.)

SMART Menu

The SMART platform utilises a tiered menu structure which is conveniently categorized into four sections. To navigate this menu, simply scroll your mouse over the menu items*.

Communicate: Send or schedule SMS, Email and Post promotions. Draft SMS and Email promotions.

Reports & Results: View Campaign results and export database reports.

Manage Database: View and manage your contacts.

Manage Account: Manage your account details, SMS credits and web forms.

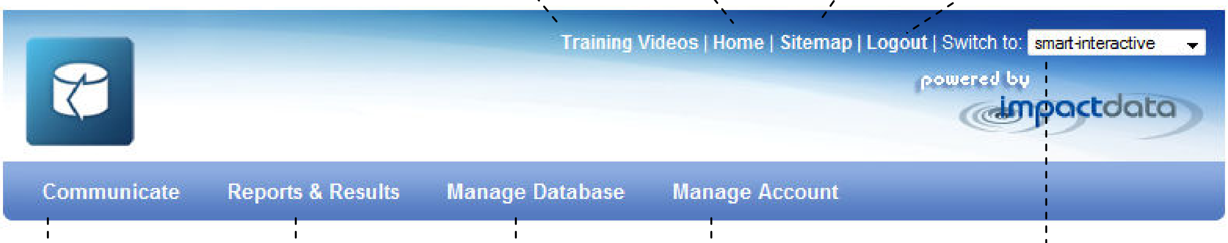
*Availability of menu items (or submenu options) is contingent on the individual client offering.

Training Videos: Gain access to a library of training videos.

Home: Navigate back to your welcome screen.

Sitemap: A breakdown of the menu and submenu structure.

Log Out: Exit the SMART platform.



Submenu Options:
Send a Promotion Now
Schedule a Promotion
Draft Email or SMS
Message Sequences
Manage Child Communications (if applicable)

Submenu Options:
View Sent Msg Log
Database Export
Database Statistics
Customer Statistics
SMS Delivery Times
Custom Reports

Submenu Options:
Search Database
Register Contacts
Staff Database
View SMS Inbox

Submenu Options:
Manage Account Contact Details
Purchase SMS Credits
View Invoice History
Manage Paper Signup Forms
Manage Web Registration Forms
Manage Custom Public Pages
Manager Question Set
Change Password

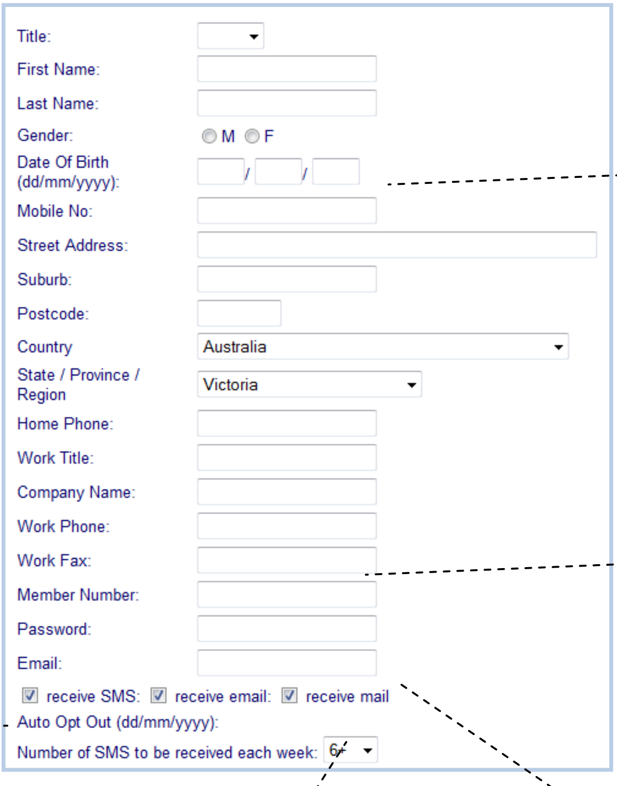
Product Switcher:
Product selection
Manage Accounts
Parent Account (if applicable)

Manage Database Menu

Register Contact: Single Entry

Manage Database → Register Contacts → Single Entry

This page allows you to add an individual contact to your database. Included on this page are the personal details of a contact as well as preference information.
Personal Details are contained in the top section of the sign up page. You must provide at least one piece of contact information such as postal address, email or mobile phone number in this section, to successfully add a contact.



Contact Details
You must include at least one piece of contact information on your new member form.

Member Number
This field should be used for a member if they have an alternative database management system / POS. This field can help identify customers for purposes of VIP cards, purchase history etc.

Auto Opt Out Date:
A set date whereby customers are automatically Opted out.

Number of SMS to be received each week:
Allows you to limit the number of SMS a customer will receive from you each week. Should a customer reach their weekly SMS limit, they will be automatically excluded from any further SMS sends in that week period.

Receive Method
Your customers can choose how they would like to be contacted. You may modify this option here.

Register Contact: Bulk Registrations

Manage Database → Register Contacts → Bulk Registrations

This page allows you to register or update up to 1000 contacts at the one time.

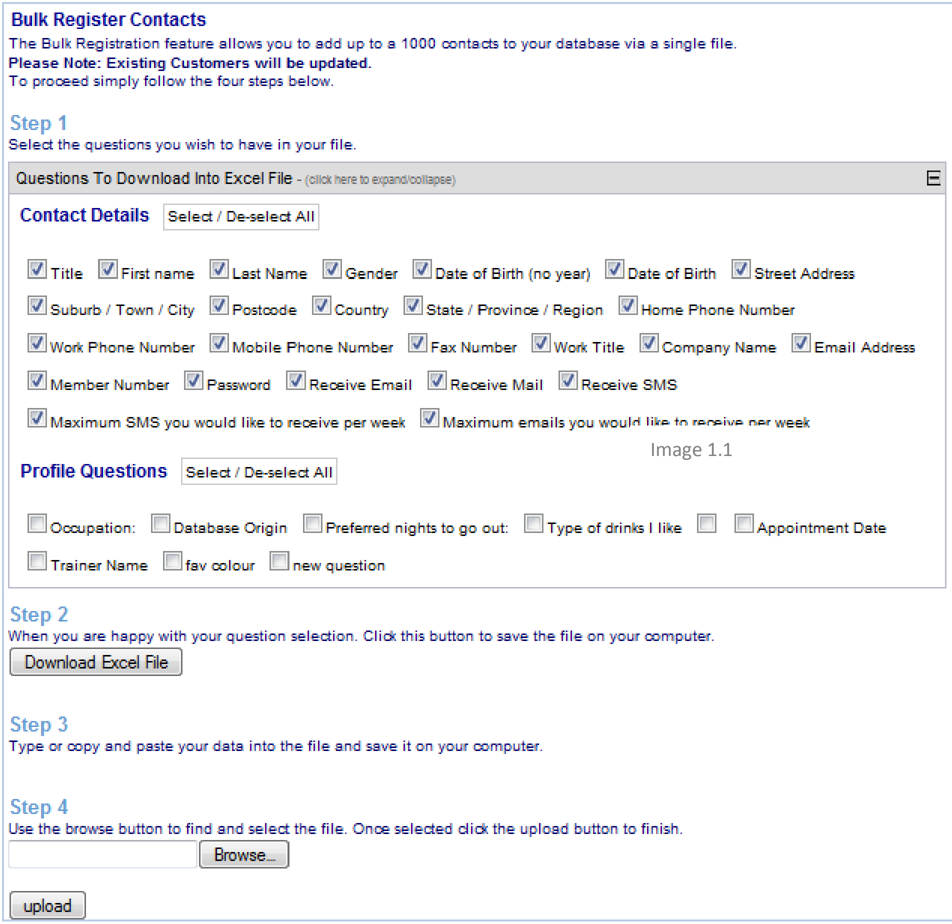


Image 1.1

Step 1: Select the questions you wish to have in your file by selecting them from the displayed list.

Step 2: Click on *Download spreadsheet* to download the contacts spreadsheet. (NOTE: Please do not make any alterations to the format of the spreadsheet or else your data upload will fail). Complete the details of customers in the pre-set columns. Your selected database fields will be represented here. Place a mark in the required field (i.e. x) to assign a contact to a field.

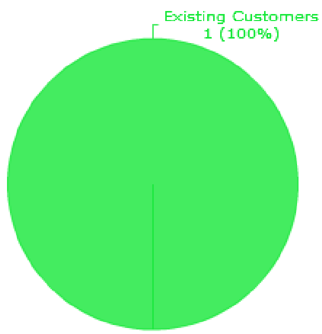
Step 3: Once the sheet is complete (max 1000 entries) save the file to your computer as Excel Spreadsheet 07-2003 format.

Step 4: Click *Browse* and locate the document off your computer then *Upload*.

Upon completion of your database upload, you will be provided with a database upload report as follows.

Summary Report

Upload Results



Report Results Key
Statistics detailing the results of your upload.

Upload Results Key

New Customers	0
Existing Customers	1
Pending Customers	0
Insufficient Data	0
Insufficient Data After Blacklisted Email	0
Insufficient Data After Blacklisted Mobile	0
Multiple Matches	0
Custom Validation Errors	0

Download Full Report

Download Full Report
A full excel report may be downloaded detailing the status of each customer in your report. Please note, this report is not available if you navigate away from this page. Please download the full report at this point should you wish to retain it for your records.

Full Report

Status
Status report on the contacts uploaded.

Status (Internal Use!)	Status Description (Internal Use!)	Title	First name	Last Name	Gender	Postcode	Home Phone Number	Mobile Phone Number	Email Address	Occupation:
					m OR f					Corporate/Office
Existing Customer		Miss	Olivia	McMillan	f	3000	95981185	0419501555	1@impactdata.com.au	
New Customer		Miss	Claire	McMillan	f	3111	95981111	0419501000	2@impactdata.com.au	
New Customer		Miss	Sandisha	Jones	f	3252	95982222	0419501111	3@impactdata.com.au	
New Customer		Mr	Hamish	Smith	m	3555	95985555	0416555555	4@impactdata.com.au	
New Customer		Mr	Lachlan	Harper	m	3555	95985556	0455555555	5@impactdata.com.au	
New Customer		Miss	Michelle	Long	f	3555	95985556	0466666666	6@impactdata.com.au	
Existing Customer		Miss	Olivia	McMillan	f	3000	95981185	0419501555	1@impactdata.com.au	

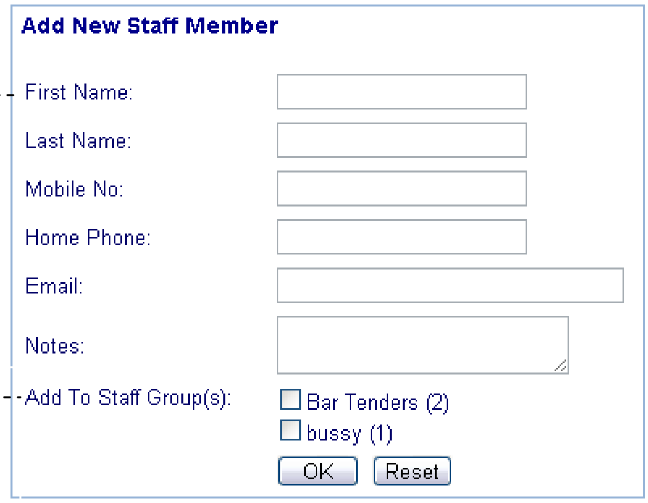
Staff Database: Add New Staff Member

Manage Database → Staff Database → Add new staff member

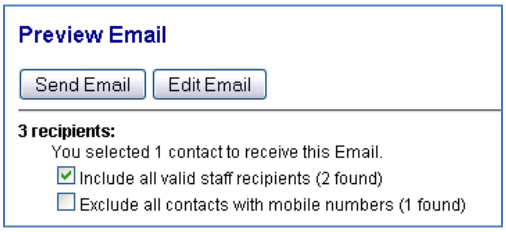
This section allows you to register staff members to your database.

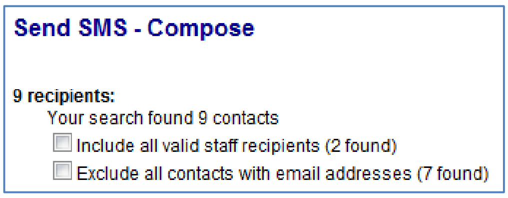
Staff Details
Name and Contact details of the staff member are entered here

Groups
Staff members can be allocated to different groups. This allows for easy categorization.
Please refer to Manage Staff Groups for more information.



You can easily include staff members in communications meant for regular contacts, just by checking the “Include all valid staff recipients” box when sending an email or SMS. Checking this box will send your communication to all staff, regardless of the group they are categorized in.





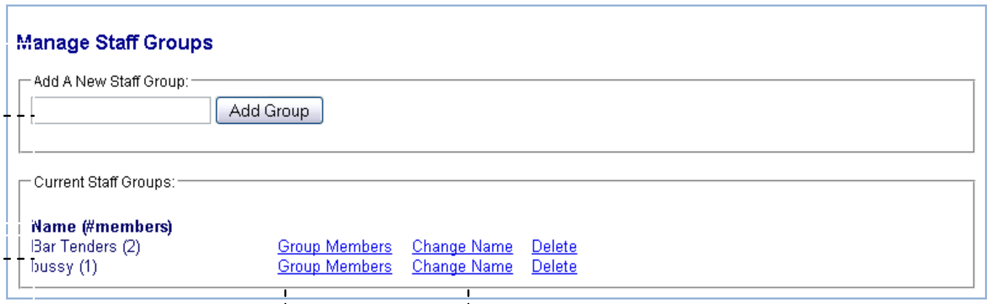
Staff Database: Manage Staff Groups

Manage Database → Staff Database → Manage staff groups

Your SMART account gives you the ability to manage create, edit and delete staff groups. Once a group is created, you may add staff members to it.

Add New Group
New groups can be created here

Current Groups
Existing staff groups are displayed here



Members
Staff members assigned to a group can be viewed here

Edit / Delete
Existing groups can be modified or deleted

Communicate Menu

Composing your Email

The Email editor is similar to using Microsoft Word. You have the option of constructing your email on screen, choosing a pre made draft, or pasting HTML directly into the composer window.

Recipient Count
Number of recipients your email will be sent to.

Customer Profile Link
Customer profile link settings can be changed here.

Subject Merge Field
A merge field can be inserted in the subject line here.

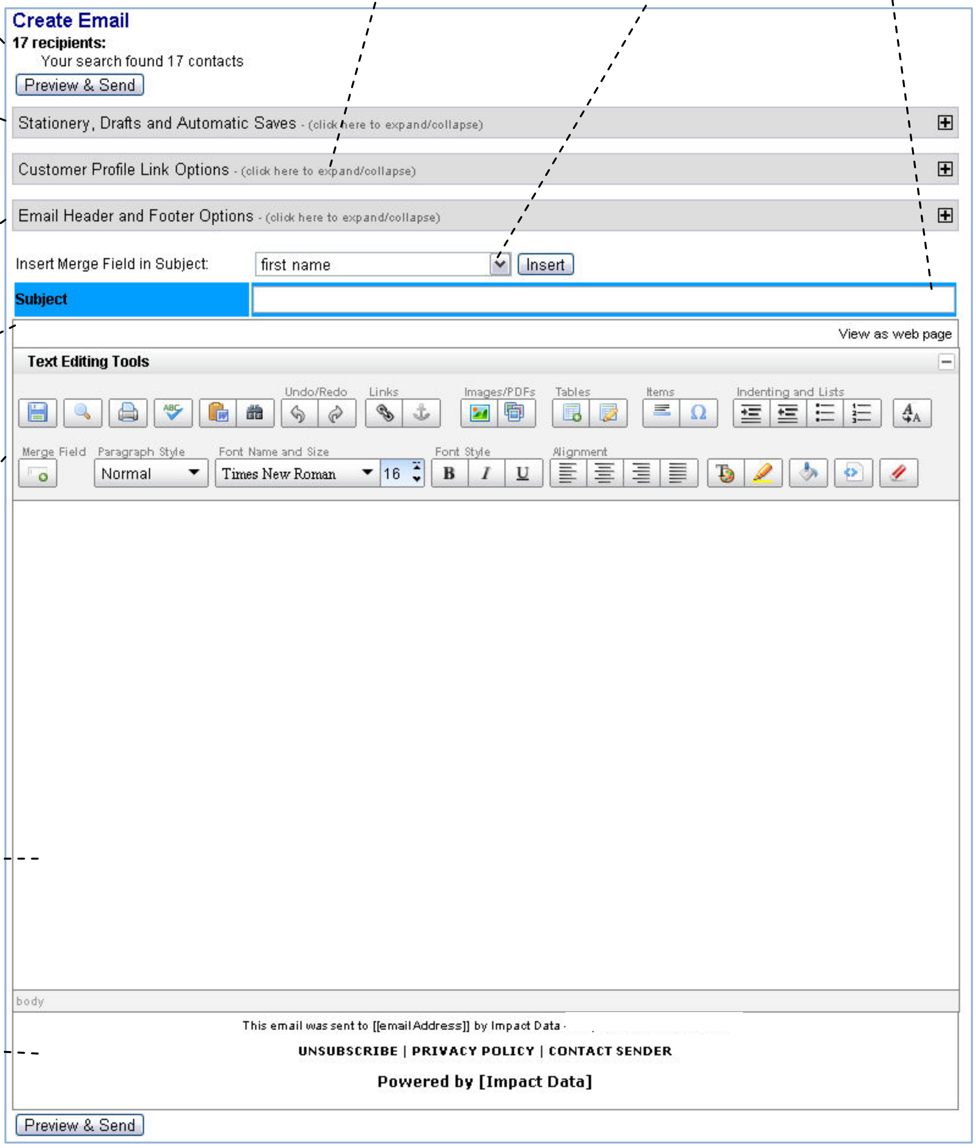
Subject Line
The email's subject line can be edited here.

Drafts and automatic saves
This area allows you to load a draft email or email template. Emails can also be retrieved from the 'automatic saves' section.

Header and Footer Options
Header and footer settings can be changed here.

Header
The email header can be viewed here. This will typically be a link to allow recipients to view their email as a web page.

Tools
A range of editing tools is available to help you create your email.



Compose
You may insert text and images in this area to create your email.

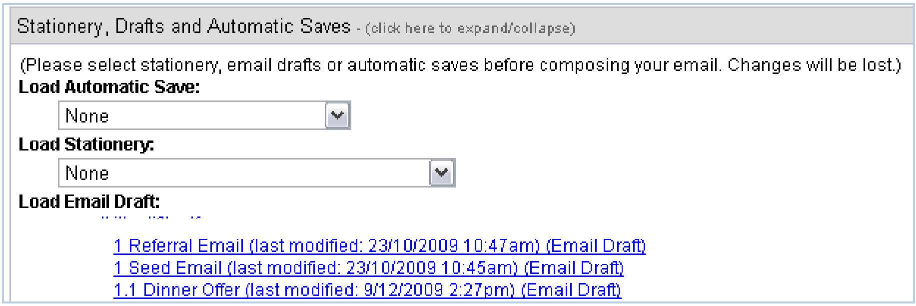
Footer
The email footer can be viewed here. This contains information about the sender and will also allow the recipient to unsubscribe from the mailing list.

Recipient Count:

This displays the number of recipients your email will be sent to.

Stationery and Drafts:

This contains your email stationery and any draft emails you have composed. To expand this selection, click on the grey shadow box.

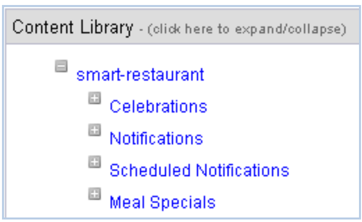


Automatic Save: The system automatically makes backups of your emails periodically while you are composing it. You may retrieve an older version of your email from this list.

Stationery: Email templates preloaded by Impact Data in your account can be found here. These are typically used as a base for creating your email before being sent.

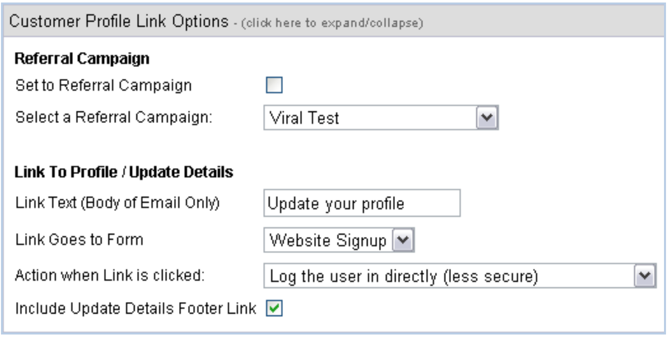
Email Draft: Here you can access emails which you have previously saved. You may send these emails right away or modify them if required.

Content Library:



If applicable, this section displays pre-created email content which has been loaded into your account by Impact Data. Emails in the section can be loaded and sent right away or can be modified, if required. To expand and explore this content, simply click on the Grey Shadow Box.

Customer Profile Link Options:



Referral Campaign
Allows you to set the email which is to be sent as a Referral campaign. Select Referral campaign and then the associated campaign before sending your email. Please note, a referral campaign must be set up prior to you sending an email as a referral campaign.

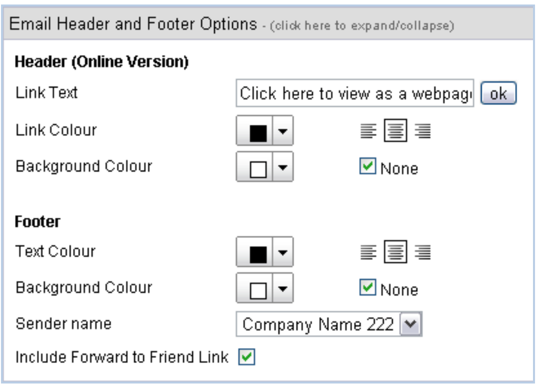
Link To Profile/Update Details
The customer profile link is a link which can be inserted into an email to take the contact directly to a web form with their details displayed for editing.

If applicable, this section allows you to configure the customer profile link. You may configure the wording of the link, the form it leads to and also what action to take when it is clicked.

This section also allows you to choose whether you would like the recipients to be able to update their details through this email by checking the “Include Update Details Footer Link”.

Email Header and Footer Options:

This is where the email header and footer are configured. To expand and explore this content, simply click on the Grey Shadow Box.



In this section you can change the wording of the header to your liking. The header allows the recipient to view the email as a webpage.

You are able to pick individual colours for the header and footer and you can also set a background colour for the text, if required.

By checking the “Include Forward to Friend Link” box, you allow the recipient to send this email to their friends, who may not necessarily be contacts in your database.

Save Disc:

Click the save disc button to save your email as a draft. Your emails will be saved to the drafts folder if you use this button.

Preview and Send:

Preview & Send

Click to go through to preview your email and choose the final settings before your send.

Preview:

This opens a pop up window with a preview of the current email being worked on. The Header and footer will also appear in the preview if they are turned on. It is important for anti spam laws that you have the footer visible in your emails to ensure your customers are able to opt out.

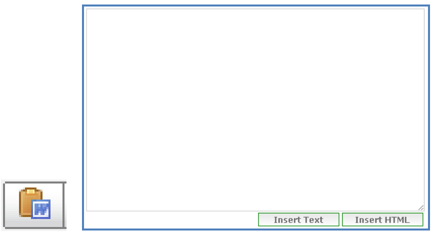
Print:

This opens a printer select window. Once a printer is selected the body of the email will be printed. The Header, Footer and subject will not be present in the printed version.

Spell Check:

There are two dictionary languages available in the spell check – English Australian and English International. You may add a word to the dictionary which will be stored as a cookie in your computer. Should you delete your cookies you will lose any saved words from your dictionary.

Paste from Word:



This displays a pop up where HTML or text from a word document can be entered into a text area. Once you have provided the HTML or Text, click on the Insert HTML/Text button. Prior to insertion the HTML/Text will be cleaned of any unnecessary code including Microsoft Word specific formatting.

Find & Replace:

This function allows you to search for text in your email and replace it with new text. Note, this function does not work when using browsers Chrome, Safari or Opera.

Undo/Redo:

The Undo function will undo any changes made. You can undo a maximum of 30 times. The Redo function will redo any changes made by the undo function.

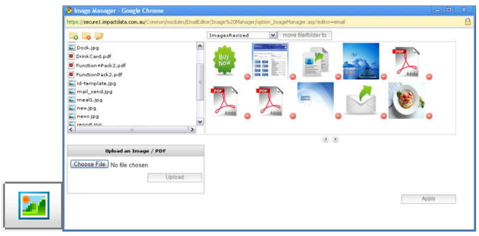
Insert Link:

To create a link, highlight over the text you would like to hyperlink and click on the Link icon. You may link the text to a web URL, an email address or an anchor point in the email itself.

Insert Anchor:

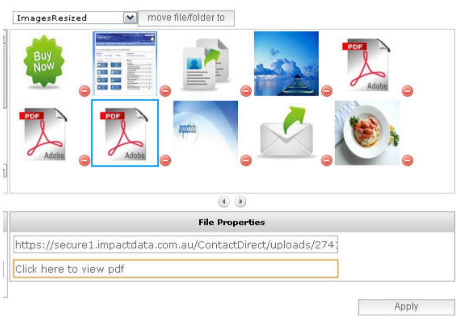
Place your cursor where you would like a bookmark to be placed in your email. Next, select the Anchor icon. This will display a menu with a text box and a button. Simply type in the name of the anchor and press apply. Once the anchor has been added to the email it will be available to select in the Insert Link menu.

Insert Image/PDF:

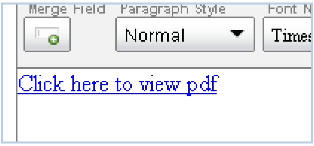


Organised into folders, the image manager allows you to upload images from your computer into your email. When you click on the image manager, a pop up window will appear. To use a new image from your computer, just click on the Browse button and select your image from your computer.

Insert Link to PDF

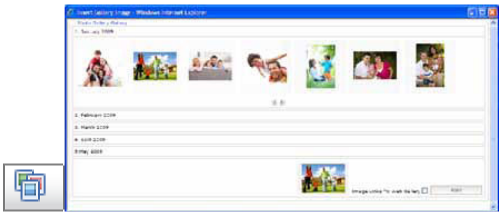


PDF documents can also be uploaded through the Image manager and then inserted in your email. To insert a link to a PDF document, select the PDF and under File Properties you may change the wording of the link to your liking, for e.g. “Click here to view PDF”. Click on Apply to insert the link in your email. It will then appear in your email as below.



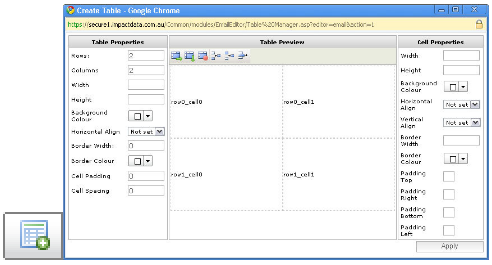
Clicking on the link will open up a new window to view the PDF document.

Insert Image from Web Gallery:



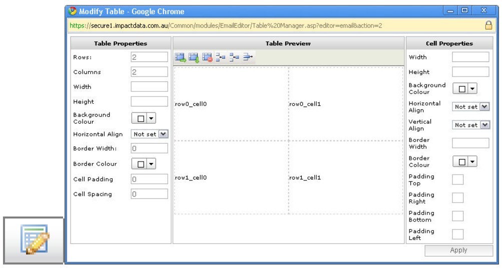
This function will open up the Web Gallery popup. The first thing you will see is a list of your Web Gallery folders. Navigate through the folder by using the left and right arrows underneath the thumbnail images. Once you have located the image you need, insert the image by clicking the Image Thumbnail and then click apply. When you select an image to insert, you also have the option of adding a link to the image. The link will link directly to your web gallery.

Insert Table:



In the Create Table window, nominate the number of columns and rows your table requires. You may also set a table width (such as 500), height, alignment, background colours, borders and padding and spacing.
Individual cells can also be formatted by clicking on a cell in the Table Preview area and formatting it in the Cell Properties area. You can merge cells by selecting Merge Right or Merge Down when a cell is selected.

Edit Table:



Select the table in your email and click on Edit Table to change the table properties in the Modify Table window.

Insert Horizontal Line:

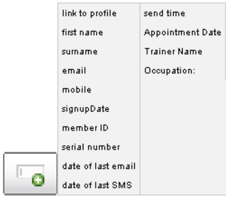
This function will insert a line horizontally where ever you have placed your curser.

This can be used as ‘section breaks’ in your email.

Insert Special Character:

Special characters and symbols are available in this menu item.

Insert Merge Field:



This function allows you to insert available merge fields in the content of your email.

Formatting:

Selections here will enable you to select font styles and colours.

Indents, Lists & Alignment:

Selections here will enable you to modify the layout of your content.

Remove Formatting:

This function allows you to remove any formatting attached to an item and resets it to its original settings.

Body Background Colour:

This function allows you to pick a background colour for the body of the email.

Switch Views:

This function will allow you to switch between the design view of your email and the HTML code. HTML can be directly pasted into this view.

Clear Content:

This function will allow you to clear everything in the email editor and start again from scratch. A warning will appear prior to removing the content.

Composing your SMS

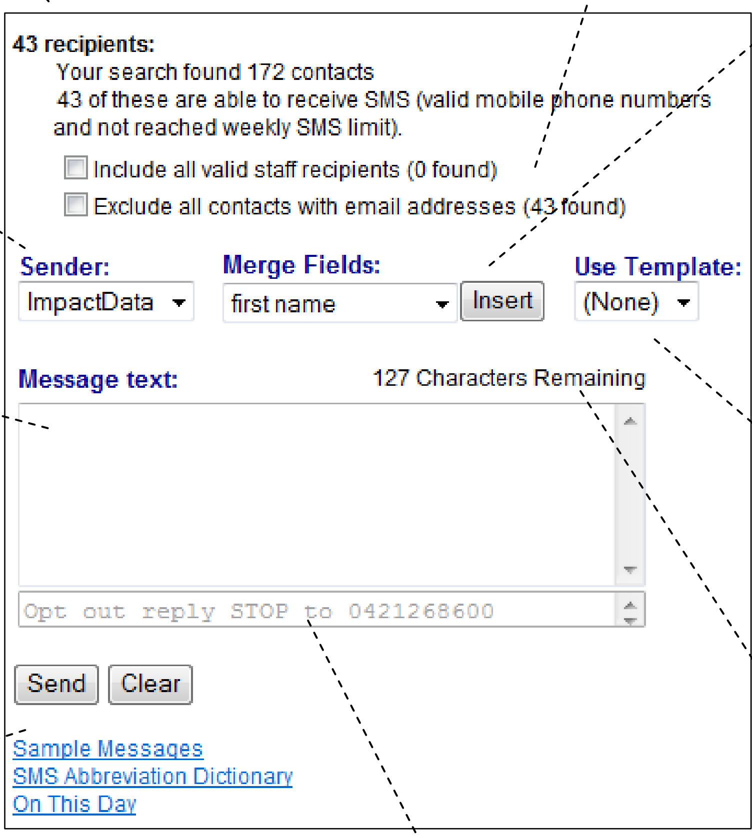
The SMS composition page allows you to you to send an SMS by either choosing a pre made template or typing a new SMS in from scratch.

Recipient Count
This shows you how many people will receive your SMS. You may also choose to add Staff to your SMS recipients.

Exclude Email:
Save Money by checking this box to exclude all contacts with an email address.

Sender
If you have multiple sender fields you may choose who your SMS is sent from with this drop down box.

Merge Fields
You may merge in any piece of information you have on your contacts by choosing from this drop down box. Speak with your support team to select your meregable fields.



Text Field
Type your SMS text into this box.

Template
Choose a Pre Saved Template from this drop down.

SMS Samples
A library of SMS samples which allow you to copy and paste from promotions with proven success.

Characters Remaining
This counts the characters you have remaining in your SMS. All SMS can contain 160 characters or less.

Opt Out
You must allow your customers to Opt Out from your communications. This text is automatically placed in the SMS for you.

Communicate: Send Email, SMS or Mailing Labels

Communicate → Send a promotion or campaign now → Send Email

Communicate → Send a promotion or campaign now → Send SMS

Communicate → Send a promotion or campaign now → Create Mailing Labels

You may choose from a number of search methods to select recipients for your email, SMS or mailing labels. Available search methods are:

Search for Recipients:	Search for recipients (or groups of recipients) using preference and/or profile information
Select Recipients:	Select specific recipients
Sent to all Contacts:	Select entire database
Send to email address /mobile number:	Paste email addresses or mobile numbers from another file or database

Additional features available for SMS and Email sends only:

Send to Staff:	Select staff in database
Upcoming Birthdays:	Select milestone birthdays, i.e. 21st Birthdays, 50th Birthdays
Send by Birthday:	Select recipients with birthdays in a specific month (i.e. November) or on a specific day (i.e. 12th)

Additional features available for SMS sends only:

Send to New Contacts:	Select contacts who have not yet received a communication

Send a communication by searching for recipients

Communicate → Send a promotion or Campaign now → Send Email/Send SMS/Create Mailing Labels →Search for Recipients

Choosing “Search for recipients” will direct you to a “Search profile” page where you can select from categories to define the recipients of the communication.

Send Email – Search Profile	
Step	**Description**
Step 1	Navigate to: Communicate → Send a Promotion or campaign now → Send An Email → Search for Recipients
Step 2	Select the Profile criteria you wish to send to
Step 3	Click on the Continue Button
Step 4	Compose your message and send

Send SMS – Search Profile	
Step	**Description**
Step 1	Navigate to: Communicate → Send a Promotion or campaign now → Send An SMS → Search for Recipients
Step 2	Select the Profile criteria you wish to send to
Step 3	Click on the Continue Button
Step 4	Compose your message and send

Create Mailing Labels – Search Profile	
Step	**Description**
Step 1	Navigate to: Communicate → Send a Promotion or campaign now → Create Mailing Labels → Search for Recipients
Step 2	Select the Profile criteria you wish to send to
Step 3	Click on the Continue Button
Step 4	Select the type of labels you would like to produce, or download the database file

The “Search profile” function enables you to use the “AND” or “OR” search logic to define recipients. For instance you can search for customers who are *females* “AND” *18-21 years old* (see Image 1), which would return only those females who are 18-21 years old. Or you could search customers who are *females* “OR” *18-21 years old* (see Image 2) which would return females of any age and all 18-21 year olds regardless of gender. Generally speaking, using the “OR” functionality will return a greater number of customers.

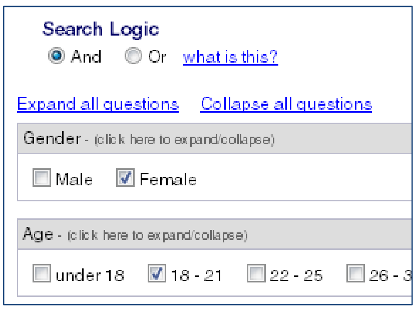


Image 1
AND Search Functionality

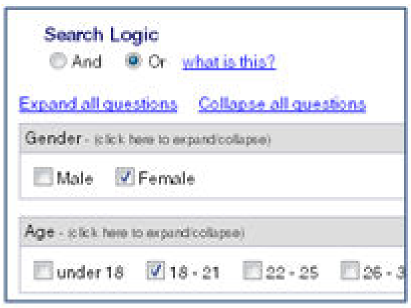


Image 2
OR Search Functionality

Send a communication by selecting recipients

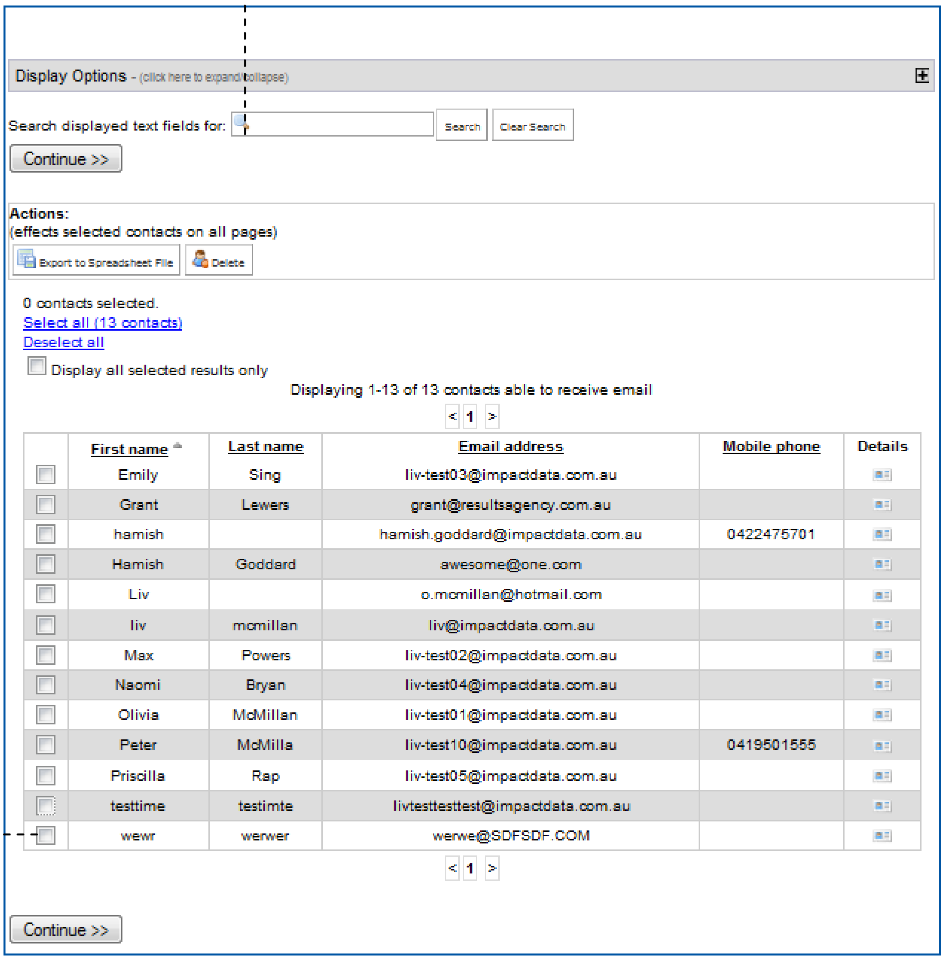
Communicate → Send a promotion or Campaign now → Send Email/Send SMS/Create Mailing Labels →Select Recipients

Select individual contacts from your database as recipients of the communication.

Search text fields:
Search by name, email address mobile number etc.

Display Options:
Customise the search fields that appear in the columns below.

Available fields:
First name
Last name
Email address
Mobile phone
Home phone
Street address
Suburb
Post code
Age
Company Name
State
Country
Member ID
Work Title
Work Phone



Select contact:
Check the box to select customer as a recipient.

Send Email – Select Recipients	
Step	**Description**
Step 1	Navigate to: Communicate → Send a Promotion or campaign now → Send An Email → Select Recipients
Step 2	Search for the recipients you require using the Search Displayed Text Fields option. Check the names of recipients you wish to send to
Step 3	Click on the Continue Button
Step 4	Compose your message and send

Send SMS – Select Recipients	
Step	**Description**
Step 1	Navigate to: Communicate → Send a Promotion or campaign now → Send An SMS → Select Recipients
Step 2	Search for the recipients you require using the Search Displayed Text Fields option. Check the names of recipients you wish to send to
Step 3	Click on the Continue Button
Step 4	Compose your message and send

Create Mailing Labels – Select Recipients	
Step	**Description**
Step 1	Navigate to: Communicate → Send a Promotion or campaign now → Create Mailing Labels → Select Recipients
Step 2	Search for the recipients you require using the Search Displayed Text Fields option. Check the names of recipients you wish to send to
Step 3	Click on the Continue Button
Step 4	Select the type of labels you would like to produce, or download the database file

Send a communication to all contacts

Communicate → Send a promotion or Campaign now → Send Email/Send SMS/Create Mailing Labels → Send to all

Choose this option to send the communication to all valid contacts in your database, that is, only contacts with a valid email address or live mobile phone number and who have not opted out of the database.

Send Email – Send to All	
Step	**Description**
Step 1	Navigate to: Communicate → Send a Promotion or campaign now → Send An Email → Send to All
Step 2	Compose your message and send

Send SMS – Send to All	
Step	**Description**
Step 1	Navigate to: Communicate → Send a Promotion or campaign now → Send An SMS → Send to All
Step 2	Compose your message and send

Create Mailing Labels – Send to All	
Step	**Description**
Step 1	Navigate to: Communicate → Send a Promotion or campaign now → Create Mailing Labels → Send to All
Step 2	Select the type of labels you would like to produce, or download the database file.

Send a communication to staff

Communicate → Send a promotion or Campaign now → Send Email/Send SMS → Send to Staff

You may send the communication to staff in your database (as registered in your SMART account via Manage Database → Staff Database).

Send Email – Send to Staff	
Step	**Description**
Step 1	Navigate to: Communicate → Send a Promotion or campaign now → Send An Email → Send to Staff
Step 2	Select the individual staff or staff group you want to send to
Step 3	Compose your message and send

Send SMS – Send to Staff	
Step	**Description**
Step 1	Navigate to: Communicate → Send a Promotion or campaign now → Send An SMS → Send to Staff
Step 2	Select the individual staff or staff group you want to send to
Step 3	Compose your message and send

Send a communication by pasting in contacts

Communicate → Send a promotion or Campaign now → Send Email → Send to Email Addresses

Communicate → Send a promotion or Campaign now → Send SMS → Send to Mobile Numbers

Use this option to send your communication to email addresses or mobile phone numbers that are not stored the SMART database but that you have "copied and paste" from another file or program. This is a useful feature for ad hoc database sends or sends to non contacts. Whilst you may send to up to 10,000 contacts at one time using this function, it does not offer the benefit of tracking.

NB. This function is Anti Spam compliant and contacts pasted for send will be subject to and caught by the Opt Out database maintained by your SMART account.

Send Email: Send to Email Addresses	
Step	**Description**
Step 1	Navigate to: Communicate → Send a Promotion or campaign now → Send An Email → Send to Email Addresses
Step 2	Paste or type the recipients email address into the box provided. You may paste up to 10,000 email addresses at once.
Step 3	Click Continue
Step 4	Compose your message and send

Send SMS: Send to Mobile Numbers	
Step	**Description**
Step 1	Navigate to: Communicate → Send a Promotion or campaign now → Send An SMS → Send to Mobile Numbers
Step 2	Paste or type the recipients mobile numbers into the box provided. You may paste up to 10,000 numbers at once.
Step 3	Click Continue
Step 4	Compose your message and send

Send a communication by Birthday Month or Day (manual)

Communicate → Send a promotion or Campaign now → Send Email → Send by Birthday

Communicate → Send a promotion or Campaign now → Send SMS → Send by Birthday

This option allows for you to search for people with a birthday in a set month (January – December). This is a manual birthday option (please refer to Birthday Messaging for an automated Birthday communication).

Send Email: Send by Birthday	
Step	**Description**
Step 1	Navigate to: Communicate → Send a Promotion or campaign now → Send An Email → Send by Birthday
Step 2	Select the month of birth you wish to send by
Step 3	Select the dates in the month you wish to select. If you wish to search for people who were born on any day during the month, leave the boxes unchecked.
Step 4	Click search, and then compose your message and send

Send SMS: Send by Birthday	
Step	**Description**
Step 1	Navigate to: Communicate → Send a Promotion or campaign now → Send An SMS → Send by Birthday
Step 2	Select the month of birth you wish to send by
Step 3	Select the dates in the month you wish to select. If you wish to search for people who were born on any day during the month, leave the boxes unchecked.
Step 4	Click search, and then compose your message and send

Create Mailing Labels: Send by Birthday	
Step	**Description**
Step 1	Navigate to: Communicate → Send a Promotion or campaign now → Create Mailing Labels → Send by Birthday
Step 2	Select the month of birth you wish to send by
Step 3	Select the dates in the month you wish to select. If you wish to search for people who were born on any day during the month, leave the boxes unchecked.
Step 4	Select the type of labels you would like to produce, or download the database file.

Send a SMS to new contacts (Manual Welcome SMS)

Communicate → Send a promotion or Campaign now → Send SMS → Send to new contacts

These options allow you to send an SMS to recipients who have not received an SMS through this menu function previously.

Send SMS: Send to new contacts	
Step	**Description**
Step 1	Navigate to: Communicate → Send a Promotion or campaign now → Send An SMS → Send to new contacts
Step 2	Compose your message and send

Send a communication by Upcoming Birthday

Communicate → Send a promotion or Campaign now → Send Email → Send by Upcoming Birthday

Communicate → Send a promotion or Campaign now → Send SMS → Send by Upcoming Birthday

This option allows for you to search for people with a birthday of a certain age approaching, i.e. all people with a 21st birthday approaching, or all people with a 50th birthday approaching.

Send Email: Send by Upcoming Birthday	
Step	**Description**
Step 1	Navigate to: Communicate → Send a Promotion or campaign now → Send An Email → Search for Upcoming Birthday
Step 2	Enter the age of the birthday, i.e. 21. Enter the date range, that is – turning 21 in 1 – 4 weeks etc.
Step 3	Click search, and then compose your message and send

Send SMS: Send by Upcoming Birthday	
Step	**Description**
Step 1	Navigate to: Communicate → Send a Promotion or campaign now → Send An SMS → Search for Upcoming Birthday
Step 2	Enter the age of the birthday, i.e. 21. Enter the date range, that is – turning 21 in 1 – 4 weeks etc.
Step 3	Click search, and then compose your message and send

Scheduling Promotions

Communicate → Schedule a Promotion → Scheduling → Schedule Email

Communicate → Schedule a Promotion → Scheduling → Schedule SMS

This option allows for you to schedule email and SMS communications up to a year in advance.

When scheduling a communication, once a date and time is selected, the message is prepared in the same way as a live message, i.e. composed from scratch or loaded from a template. See Composing your Email/SMS.

Recipients of scheduled messages are determined using the same search functions as live messages. See Communicate: Send Email, SMS or Mailing Labels for an overview of search methods.

Once the message is scheduled to go, no further action is required from the user.

Schedule Email	
Step	**Description**
Step 1	Navigate to: Communicate → Schedule a Promotion → Scheduling → Schedule Email
Step 2	Select the date and time you would like to schedule the promotion for and click on Continue.
Step 3	Select or Search for the recipients. See Communicate: Send Email, SMS or Mailing Labels for more information.
Step 4	Compose your email from scratch or load a previously saved draft. See Composing your Email/SMS for more information.
Step 5	Click on Save to preview your email
Step 6	Once the email is ready to go, click on Schedule Email to finalise it.

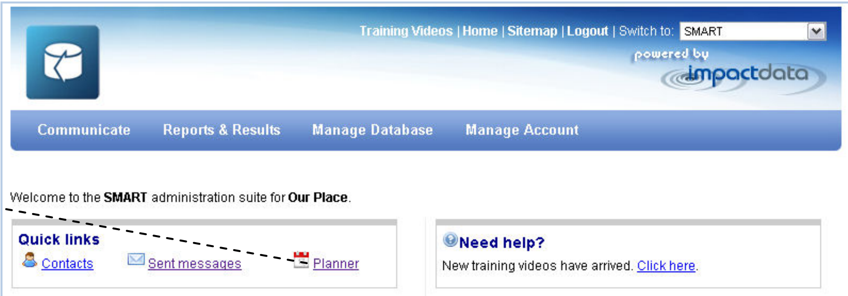
Schedule SMS	
Step	**Description**
Step 1	Navigate to: Communicate → Schedule a Promotion → Scheduling → Schedule SMS
Step 2	Select the date and time you would like to schedule the promotion for and click on Continue.
Step 3	Select or Search for the recipients. See Communicate: Send Email, SMS or Mailing Labels for more information.
Step 4	Compose your SMS from scratch or load an SMS from the content library. See Composing your Email/SMS for more information.
Step 5	Click on Continue to finalise your communication.

View Scheduled Promotions

Communicate → Schedule a Promotion → Scheduling → Planner
OR
Click on Planner on the Welcome Screen

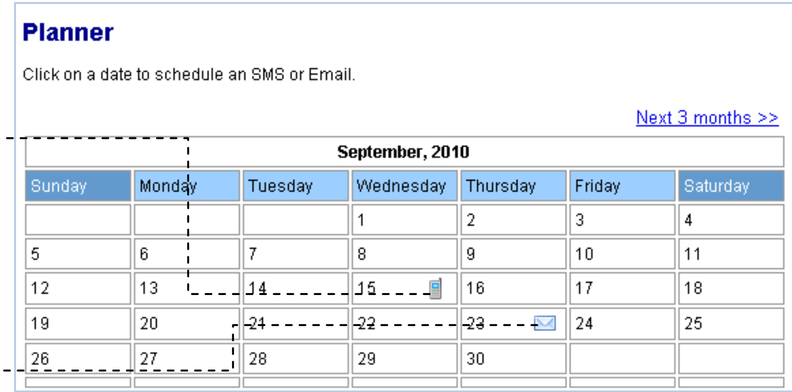
View Scheduled Promotion	
Step	**Description**
Step 1	Navigate to: Communicate → Schedule a Promotion → Scheduling → Planner
Step 2	A scheduled SMS will be indicated by the following icon: A scheduled Email will be indicated by the following icon: Click on a date to view the promotions scheduled on that day.

Planner
Click here to view scheduled messages or to pick a date to schedule a communication



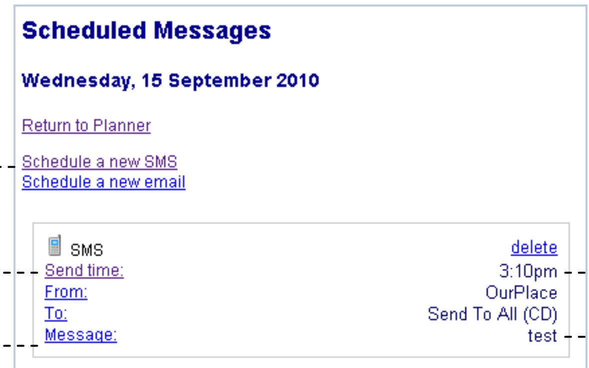
Schedule SMS
This icon indicates that at least one (1) SMS has been scheduled on this day.

Schedule Email
This icon indicates that at least one (1) email has been scheduled on this day.



Schedule SMS/Email
Allows you to select the type of promotion you would like to schedule on this day.

Modify Preferences
Allows you to change the settings of the scheduled message.



Overview
This section provides an overview of the scheduled message.

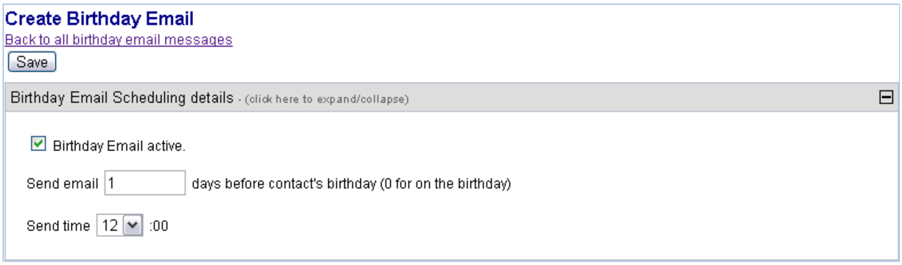
Scheduling Birthday Messages

Communicate → Schedule Birthday Message → SMS

Communicate → Schedule Birthday Message → Email

This option allows for you to schedule a birthday email or SMS to go out to your contacts. You may choose the send out communications on the day itself, or schedule it to go a few days prior.

Set a New Birthday Email Message



Step	Description
Step 1	Navigate to: Communicate →Schedule a Promotion → Schedule Birthday Message → Email
Step 2	Click on Add New Birthday Email Message
Step 3	Ensure that the "Birthday Email Active" checkbox is ticked
Step 4	Set the day and time on which you would like the birthday message to be sent.
Step 5	Compose/Load your email. See Composing your Email/SMS for more information.
Step 6	Click on Save to preview your email
Step 7	Click on Save Birthday Email to finalise your communication.

Set a New Birthday Email SMS

Step	Description
Step 1	Navigate to: Communicate →Schedule a Promotion → Schedule Birthday Message → SMS

Step 2	Click on Add New Birthday SMS Message
Step 3	Compose your SMS. See Composing your Email/SMS for more information.
Step 4	Set the day and time on which you would like to birthday message to be sent.
Step 5	Ensure that the “Birthday SMS Active” checkbox is ticked
Step 6	Click on Save to finalise your communication.

Edit an Existing Birthday SMS Message

Step	Description
Step 1	Navigate to: Communicate → Schedule a Promotion → Schedule Birthday Message → SMS
Step 2	Locate the SMS you wish to modify and click on Edit
Step 3	Compose your SMS. See Composing your Email/SMS for more information.
Step 4	Set the day and time on which you would like to birthday message to be sent.
Step 5	Ensure that the “Birthday SMS Active” checkbox is ticked
Step 6	Click on Save to finalise your communication.

Edit an Existing Birthday Email Message

Step	Description
Step 1	Navigate to: Communicate → Schedule a Promotion → Schedule Birthday Message → Email
Step 2	Locate the email you wish to modify and click on Edit
Step 3	Ensure that the “Birthday Email Active” checkbox is ticked
Step 4	Set the day and time on which you would like to birthday message to be sent.
Step 5	Compose/Load your email. See Composing your Email/SMS for more information.
Step 6	Click on Save to preview your email
Step 7	Click on Update Birthday Email to finalise your changes.

Occasion Reminders

Communicate → Schedule Promotion → Schedule Occasion Reminder

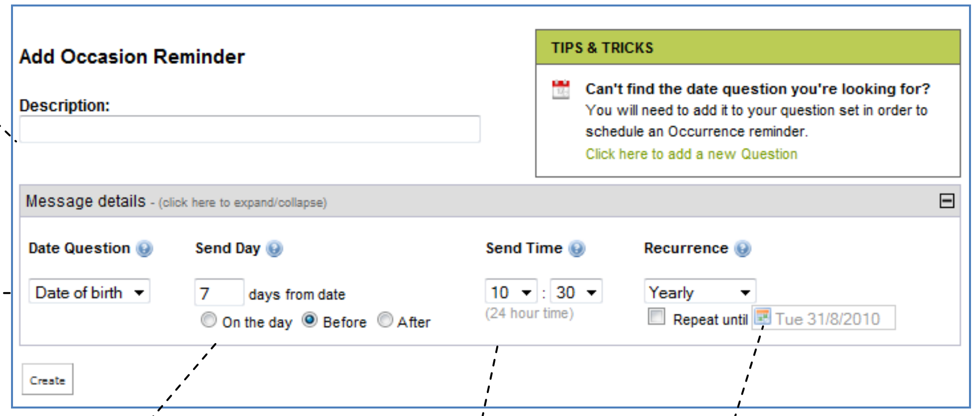
Occasion reminders can be utilised to set promotions based on date based events which occur either weekly, monthly, yearly, or once. Appointment reminders, anniversary promotions and birthday greetings are common uses of this function
Occasion reminders have the benefit of profile search based sending, allowing you to segment birthday messages based on profile searching such as gender or VIP status.

Set a New Occasion Reminder

Communicate → Schedule Promotion → Schedule Occasion Reminder → Add New Occasion Reminder

Description
Name of the Occasion reminder being set for later reference.

Date Question
The date question is taken from your question set. If you cannot see the question you need here, please add it to your question set in the Manage Account section of your SMART Account.



Send Day
Select the day before or after the event you would like the message to go. 0 days is the day of the event.

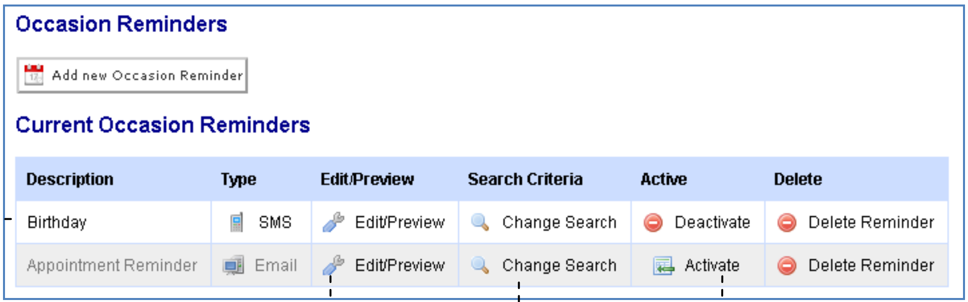
Send Time
Select the day before or after the event you would like the message to go. 0 days is the day of the event.

Recurrence
Send Once should be used for appointments which occur only once. A yearly occurrence is an annual event such as a birthday or an anniversary. Repeat Until allows you to set a date where the Occurrence reminder is stopped.

Step	Definition
Step 1	Complete the details of the Occasion reminder to set as above and click Create
Step 2	Add search logic to the search if required using the Edit Search Criteria button.
Step 3	As a SMS or Email communication.
Step 4	Save the Occasion Reminder.

View Occasion Reminders

Communicate → Schedule Promotion → Schedule Occasion Reminder → View Occasion Reminders



Description
Name of the Occasion reminder.

Edit/Preview
Reminder can be modified or previewed by clicking here

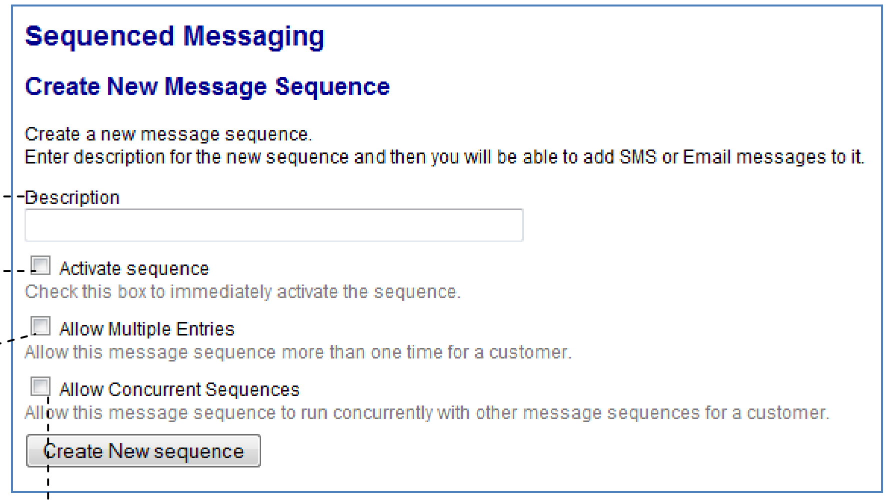
Activate/Deactivate
Allows you to activate or de-active a reminder.

Search Criteria
The search criteria for the recipients can be updated by clicking here.

Message Sequences

Messages can be sequenced such that contacts enter and exit campaign messages based on their status within your SMART account.

Communicate → Define Message Sequences and Replies → Message Sequences → Add new message sequence



Description
Name of the Sequence

Activate
On check the sequence will be activated.

Allow Multiple Entries
If checked, a contact may receive this sequence more than once should they re-match the entry criteria.

Concurrent Sequences
If the account has multiple sequences running this will allow contacts to receive more than one sequence at once.

Step	Definition
Step 1	Enter sequence description, i.e. “Plasma TV Purchase”
Step 2	Check Preference information
Step 3	Click Create New Sequence

The next page will bring up the Sequence Options

Step	Definition
Edit Sequence Details	Sequence Active / Inactive settings. Edit the initial preference information of your sequence.
Configure Seed Date Settings	Configure the ‘seed date’ for the sequence. The Seed Day is the date or occurrence which triggers the sequence.
View Contacts and Sequence Stages	View database contacts and their stage within a sequence.
Set Entry Conditions	Set the entry criteria for the sequence using profile searching.
Set Exit Conditions	Set the criteria by which a contact exits the sequence/
Add SMS Message to this sequence	Add a SMS to the communications sequence.
Add Email message to this sequence	Add an Email to the communications sequence.
Add Mailing Label Delivery to this sequence	Add delivery of mailing labels to the sequence.

Configure Seed Date Settings

The Seed Date is the date or occurrence such as a purchase of a product which triggers the sequence for a contact. Seed dates are based on a date field either as a standalone date or within a table of dates.

Question
The question from the question set which the sequence is based on.

Preference Order
Select the order of preference against other sequences running concurrently.

Allowed Period
Set the number of days which may be searched across in order to find contacts to enter the sequence.

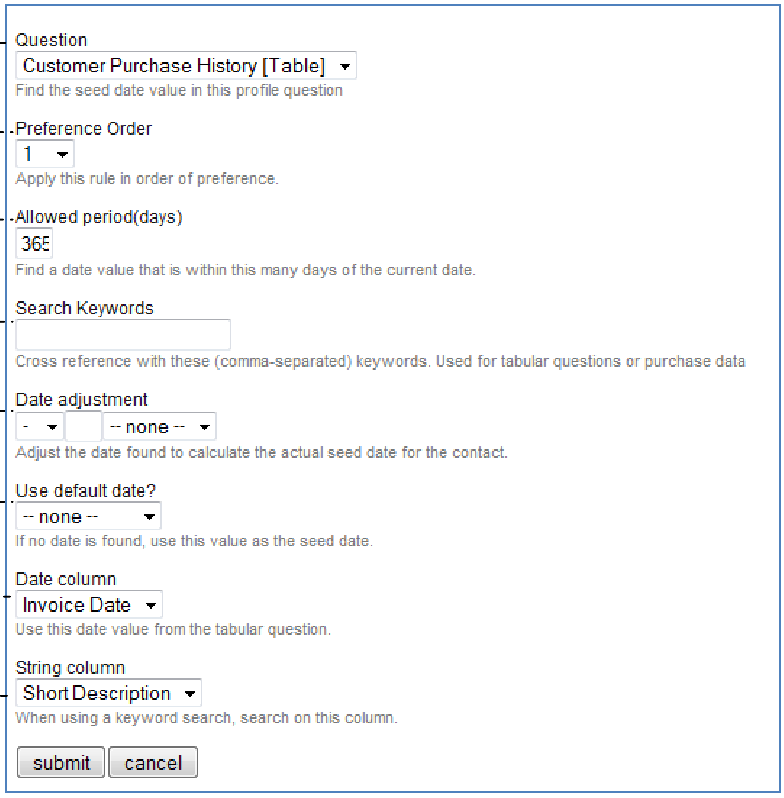
Search keywords
Keywords to search across in tabular data such as a product or brand name the sequence relates to.

Date Adjustment
Set sequence to relevant to event by x days. I.e. 5 days prior to a warranty expiry.

Use Default Date
If no date is available for seed date, use either Current Date or Customer Signup in SMART Date.

Date Column
Should tabular data be available (such as purchase history), the field used as the date field.

String Column
For keyword search the tabular data field to search across



View Contacts and Sequence Stages

View / Remove customers who are currently included in the sequence.

Sequenced Messaging

Customers with this sequence active

Sequence: [30 month]

« back

Customer	Seed Date	Messages Sent	Next Message Time	Remove From Sequence
13632429	8/01/2009 12:40:27 PM	4	3/01/2010 12:00:00 PM [Email]	Remove
Bennett	8/01/2009 1:13:31 PM	0	29/12/2010 12:00:00 PM [Email]	Remove
AJ Palermo	7/01/2009 12:42:08 PM	0	28/12/2010 12:00:00 PM [Email]	Remove
MATT	2/07/2009 12:44:04 PM	7	19/12/2011 12:00:00 PM [Email]	Remove
L MacKay	15/07/2009 4:25:26 PM	0	6/01/2011 12:00:00 PM [Email]	Remove
B & S Vangelovski	16/07/2009 11:26:46 AM	0	7/01/2011 12:00:00 PM [Email]	Remove
BILL	23/10/2009 12:47:44 PM	3	18/10/2010 12:00:00 PM [Email]	Remove
TECHNOCHEM	28/10/2009 1:14:43 PM	5	23/10/2010 12:00:00 PM [Email]	Remove
STEVEN	31/10/2009 1:35:51 PM	3	26/10/2010 12:00:00 PM [Email]	Remove

Customer
Customer Name

Seed Date
Date the customer was triggered for the sequence

Messages Sent
Number of sequenced messages received by the customer

Next Message Time
The time and type of the next message to be received

Remove
Click to remove the customer from the sequence

Set Entry Conditions

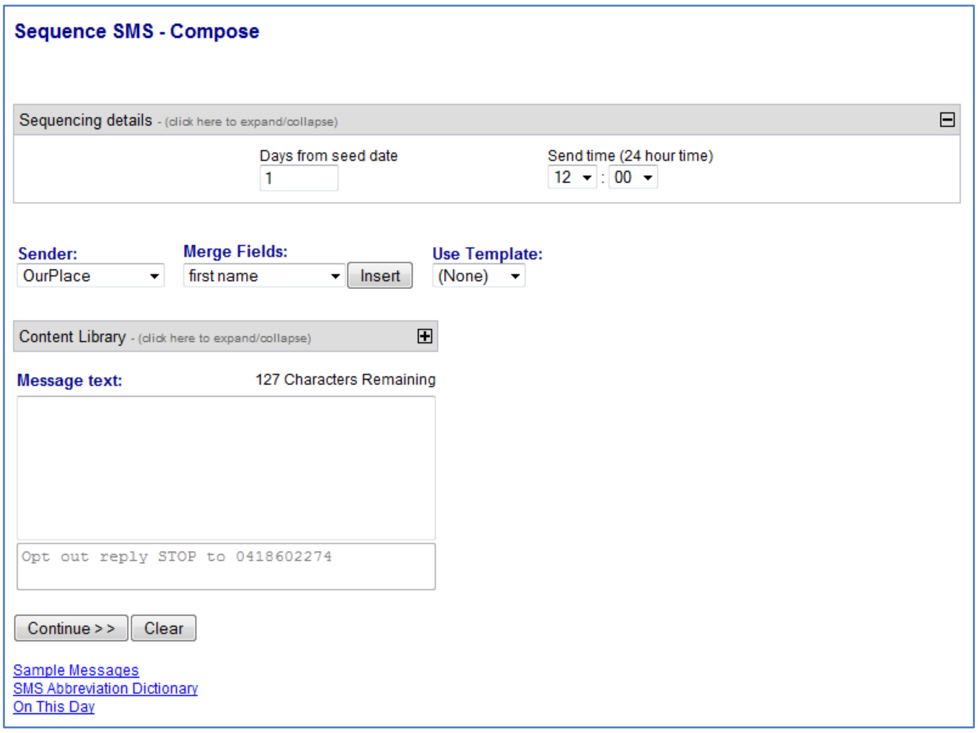
Additional search criteria for contacts to be included in the sequence, i.e. Males only, or VIP customers only. This function uses the Search Database interface.

Set Exit Conditions

Set the Exit conditions of the sequence, i.e. CANCELLED member, or purchase of the product promoted in the sequence. This function uses the Search Database interface.

Add SMS to this sequence

Add an SMS to the sequence. As multiple communications can be set for one sequence, you must nominate the day from the seed date that you wish the sequence to commence.

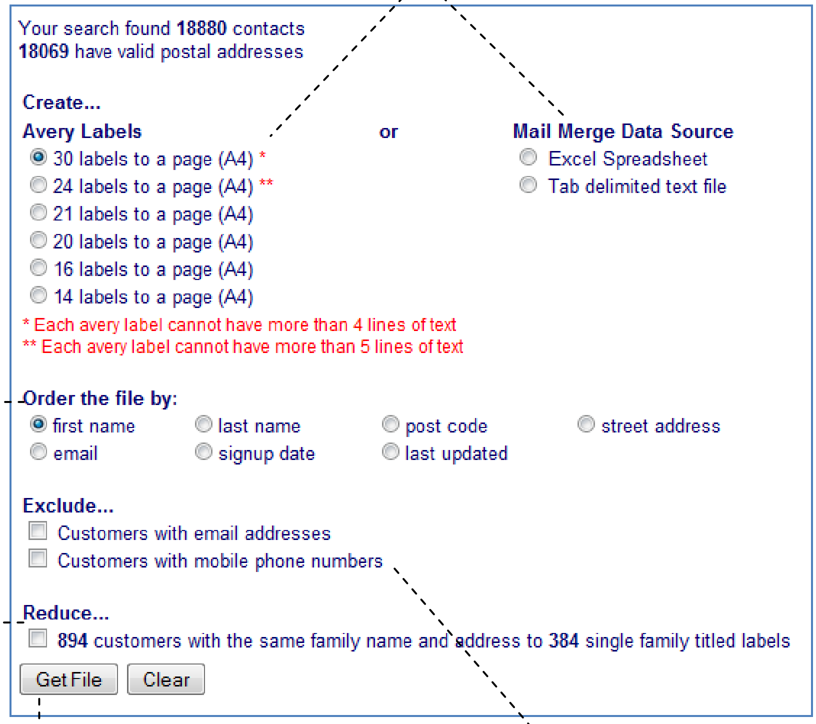


Creating Mailing Labels / Export Mail List

Mailing labels or Mail Merge files are able to be exported from your SMART account. Simply select the format you require for output and click Get File to download your spreadsheet.

Select File output

You may generate either Avery Labels and export as a Microsoft Work document, or a Mail Merge / List in Excel or Text file format.



Order File

Exports the file in the required order, i.e. alphabetically by late name, or first name.

Reduce

Save money on postage!
Select to send to a family at an address rather than individual members of a family at the same postal address.

Get File

Download the required output.

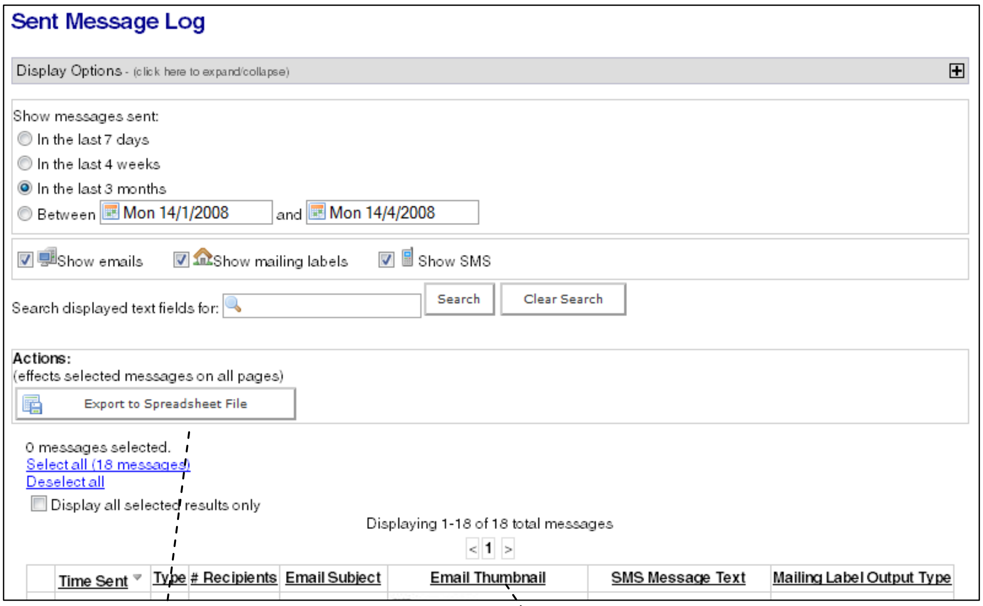
Exclude

You may choose to exclude from your export contacts who you can contact more cheaply than by post.

Reports and Results: View Sent Message Log

Reports and Results → View Sent Message Log

The sent message log provides you with a detailed report on all email sent, as well as a historical look at all of the SMS and postal campaigns sent from your account.



Display Options

Click this drop down box to show the fields you wish to display on the sent message log report. This will allow you to search and sort your findings by information such as *time sent*, Type of communications, Number of Recipients, Sender, Email subject SMS Message Text or Response Rates & Conversions.

Search Dates

Select a date range to look for previously sent communications.

Search Field

Search across the displayed fields to find the exact promotion/sent item you are looking for.

Actions

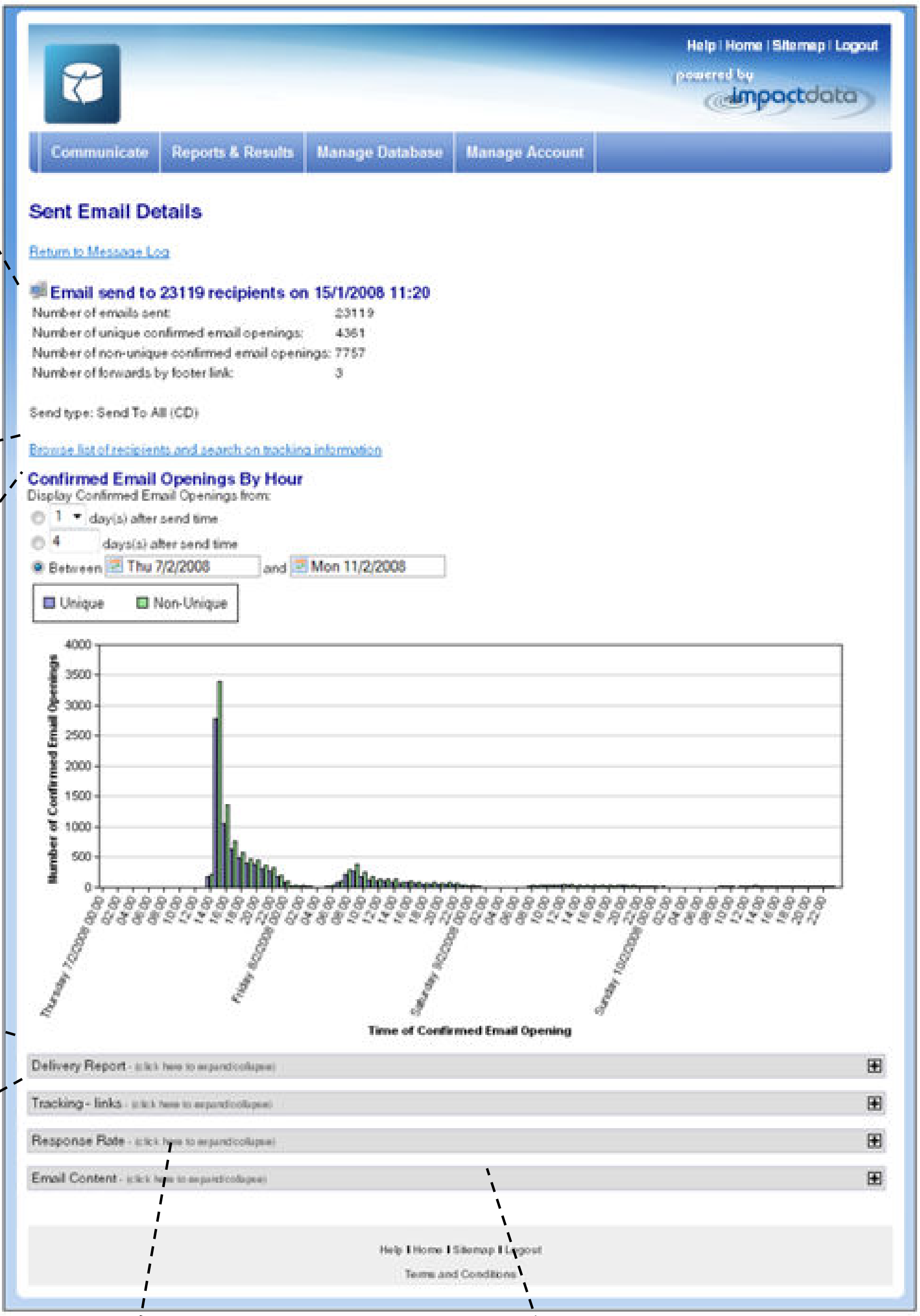
Allows you to export results to Excel.

Fields

Sort the displayed results by field.

Email Tracking Report

To view your email tracking report simply click on a thumbnail of the email you wish to view in your search results. The following will display:



Email Sent Statistics

This details how many people have opened your email (“Unique” and how many times they have opened the email (“Non-Unique”). Number of *forward to a friend* details how many people used the link at the bottom of the email to ‘forward’ the email to another person.

Browse List of Recipients

This section allows you to mine deeper into your database. This section is further detailed on the next page.

Confirmed Email Openings

Allows you to do a date search to display open rates by hour since the email send. Unique (total people) and Non Unique (total number of opens) are details on this graph.

Delivery Report

Click this shadow box to show the email Delivery statistics. This graph details email bounces due to mail box full, auto replies and invalid addresses as compared to your Open and Non Open statistics.

Tracking Report

Graph showing selected links and their click through rate as searchable by Date from send. This graph compares Non Unique and Unique Click Throughs.

Response Rate

Allows you to manually enter and store the results from your email communication for future reference.

Email Content

Click to show the content of your email send.

Mining your Results: Browse List of Recipients

Reports and Results → View Sent Message Log → Select Email → Browse List of Recipients

This report allows you to perform further mining of your email send by searching your tracking report and performing functions on the selected recipients. For Instance:

Search Your Email Tracking Report and send an email, SMS or export those people who:

- Opened or Did Not Open the email
- Forward or did not forward the email
- Clicked on a particular link/links
- Did not click on a link
- To those recipients who had a bounced email
- To those recipients who did not have a bounced email.

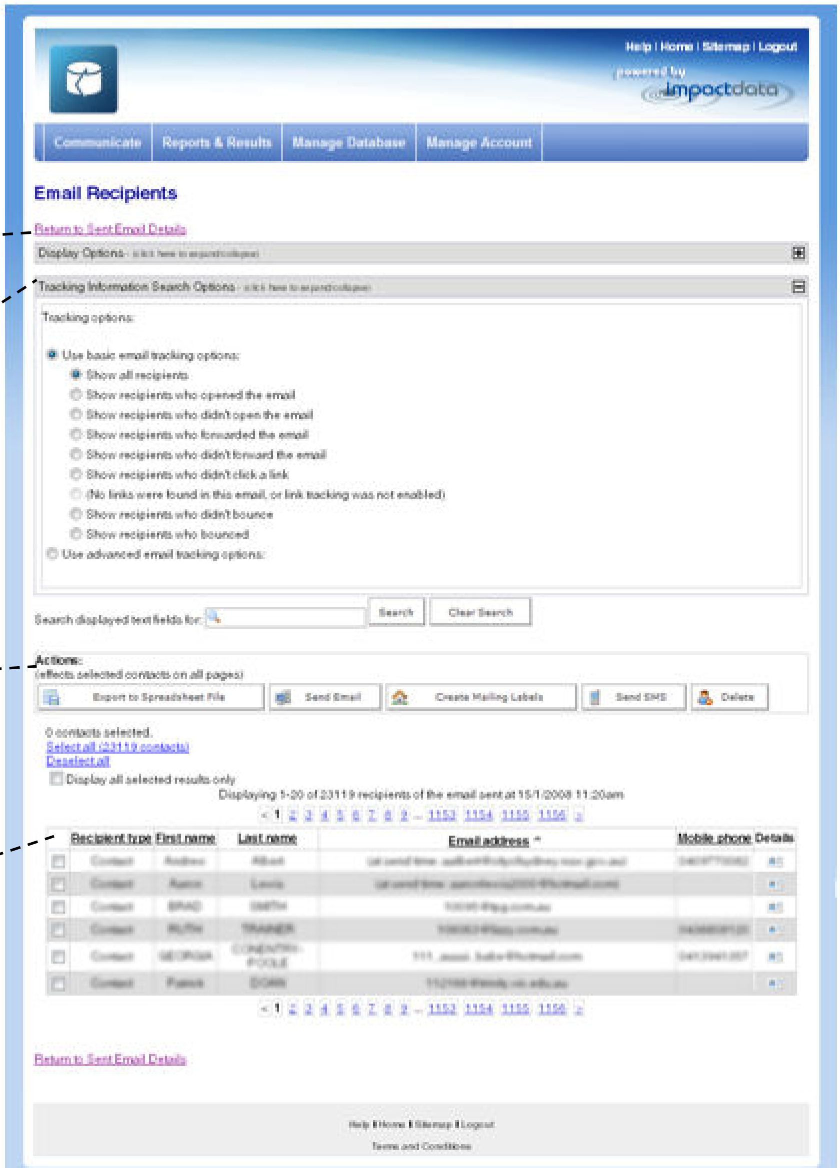
This functionality gives you the freedom to further communicate with chosen parties.

Display Results
Allows you to choose what fields are displayed in the search results which allow you to search across that text for chosen words, characters or letters.

Tracking Information
Allows for the list of recipients to be searched via set criteria such as links clicked or email opens as discussed above.

Actions
Allows actions to be performed to the resulting people. You may: Send them an email, an SMS, or a letter, or you may export them or delete them from your database.

Search Results
Displays your affected people. Before filtering, the first screen when entering will show the total list of recipients.



Reports and Results: Database Export

Reports and Results → Database Export

This function allows you to export the contacts from your database to an Excel spreadsheet or a Text file.

There are 3 ways to search for contacts you would like to export:

- Reports and Results → Database Export →Select All Contacts

This allows you to export all the contacts from your database to your desired format.

- Reports and Results → Database Export →Search For Contacts

This allows you to do a profile search for particular contacts that you would like to export. Please refer to send a communication by Searching for Recipients for more information about how to do a profile search.

- Reports and Results → Database Export →Sort By Birthday

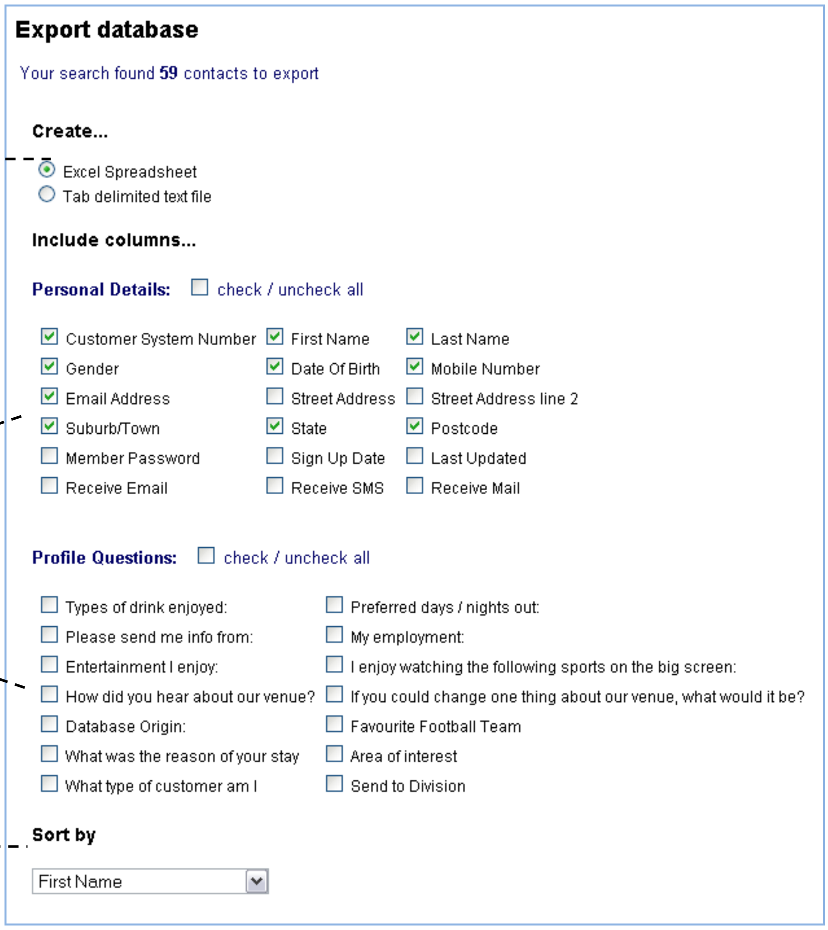
This allows you do search for and export contracts based on their birth month or birthday. Please refer to *Send by Birth Month or Day* for more information about how to search by birthday.

Once you have selected the contacts, you have the ability to customize your export.

File Format
Allows you to choose in which format you would like to export your database.

Fields
Allows you to choose the information you would like to be included in the export.

Sort By
Allows you to sort your contacts by Personal Details.



Reports and Results: Database Statistics - Opt Out Report

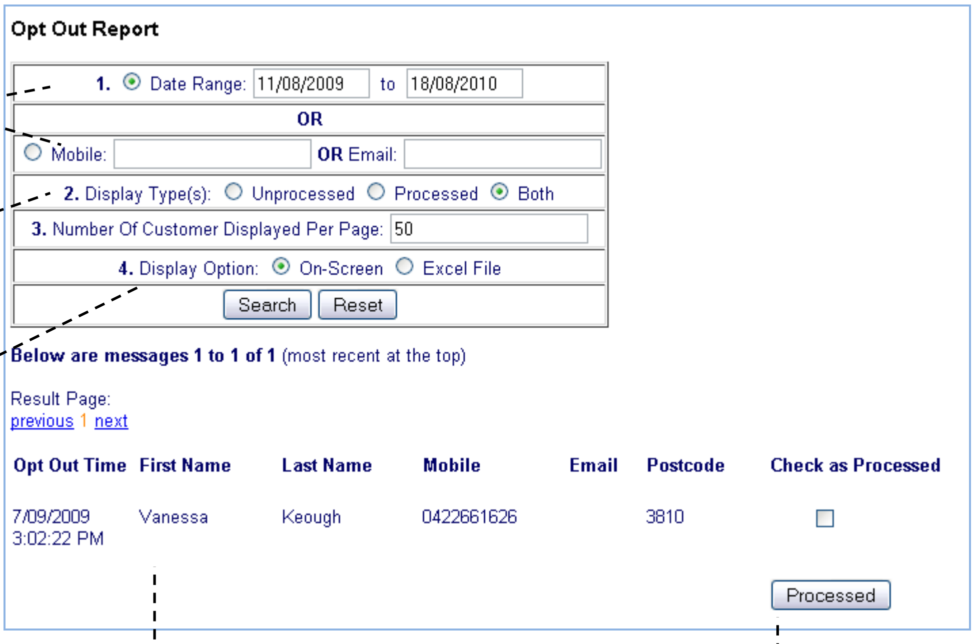
Reports and Results → Database Statistics → Opt Out Report

This function allows you to view or export a list of contacts that have opted out of receiving communications. An Opted Out contact is a contact who has replied to an SMS or Email and said they wish to be removed from your database.

Search Options
Allows you to search within a date range or to search by mobile or email address.

Display Type
Allows you to choose between displaying processed and/or unprocessed contacts

Display Option
Allows you to view the results of your search on the screen or export your results to an Excel spreadsheet.



On-screen Display
Results of the search is displayed here

Processed
Should you maintain an external database to your SMART account you may flag names here as *Processed* once you have opted them out from your separate system.

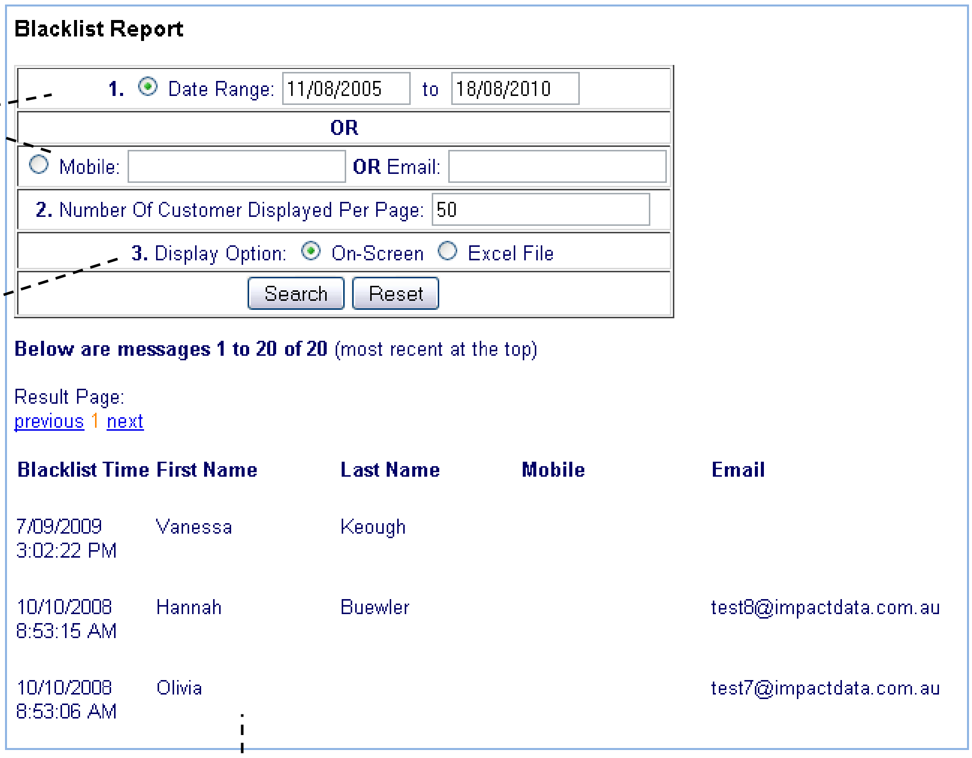
Reports and Results: Database Statistics - Blacklist Report

Reports and Results → Database Statistics → Blacklist Report

This function allows you to view or export a list of contacts that have been blacklisted and will not be receiving any further communications.
A contact becomes blacklisted if they have been removed from the database due to an invalid mobile number or email address or they have been 'blacklisted' upon being manually deleted from your database.

Search Options
Allows you to search within a date range or to search by mobile or email address.

Display Option
Allows you to view the results of your search on the screen or export your results to an Excel spreadsheet.



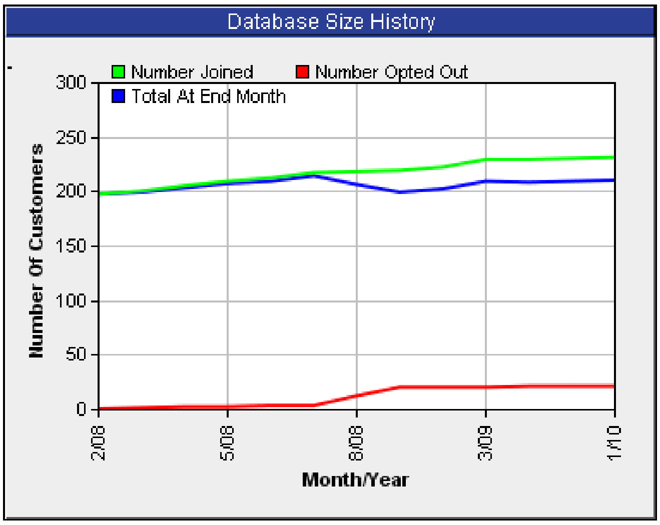
On-screen Display
Results of the search is displayed here

Reports and Results: Database Statistics – Database Size History

Reports and Results → Database Statistics → Database Size History

This function allows you to monitor the growth of your database over time.

Database Size History Report



Graph Key
- Green line: Number of contacts who have joined your database
- Red Line: Number of contacts opted out from your database
- Blue Line: Number of contacts remaining at the end of each month

Month	Year	Number Joined	Number Opted Out	Total At End Month
February	2008	197	0	197
March	2008	3	1	199
April	2008	5	1	203
May	2008	4	0	207
June	2008	3	1	209
July	2008	5	0	214
August	2008	1	9	206
October	2008	1	8	199
February	2009	3	0	202
March	2009	7	0	209
September	2009	0	1	208
November	2009	1	0	209
January	2010	1	0	210
Totals		**231**	**21**	

Reports and Results: Customer Statistics & Postcode

Reports and Results → Customer Statistics → Postcode Results

This section of your account allows you to see an overview of how your contacts are geographically spread. You can easily identify the locality where most of your contacts reside.

Minimum
Select the number of postcodes to display per page

Fields
Sort the displayed results by these fields by clicking on the field name.

Postcode Results

Maximum postcodes to display per page: 20

Displaying 1-20 of 26 total postcodes

< 1 2 >

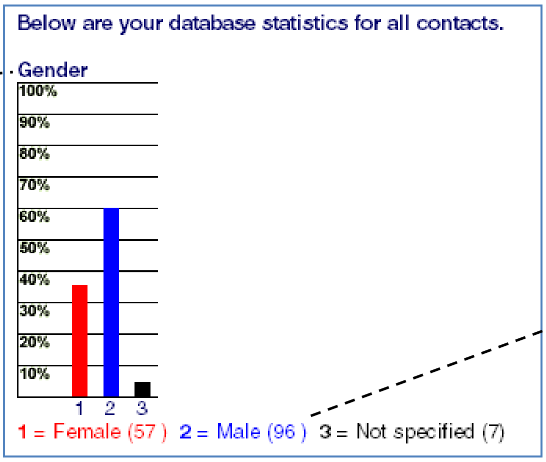
Postcode	Percentage	Customers	State	Locality
3806	30.48	64	VIC	BERWICK, HARKAWAY
3805	18.57	39	VIC	FOUNTAIN GATE, NARRE WARREN, NARRE WARREN SOUTH
3977	5.71	12	VIC	CANNONS CREEK, CRANBOURNE, CRANBOURNE EAST, CRANBOURNE NORTH, CRANBOURNE SOUTH, CRANBOURNE WEST, DEVON MEADOWS, FIVE WAYS, JUNCTION VILLAGE, SKYE, TOORADIN NORTH
3807	3.33	7	VIC	BEACONSFIELD, GUYS HILL
3810	3.33	7	VIC	PAKENHAM, PAKENHAM SOUTH, PAKENHAM UPPER, RYTHDALE, TOOMUC VALLEY
3782	2.38	5	VIC	AVONSLEIGH, CLEMATIS, EMERALD, MACCLESFIELD
3812	1.43	3	VIC	MARYKNOLL, NAR NAR GOON, NAR NAR GOON NORTH
3802	0.95	2	VIC	ENDEAVOUR HILLS
3804	0.95	2	VIC	NARRE WARREN EAST, NARRE WARREN NORTH
3803	0.48	1	VIC	HALLAM
3978	0.48	1	VIC	CARDINIA, CLYDE, CLYDE NORTH
3814	0.48	1	VIC	CORA LYNN, GARFIELD, GARFIELD NORTH, VERVALE
3842	0.48	1	VIC	CHURCHILL
3931	0.48	1	VIC	MORNINGTON
3976	0.48	1	VIC	HAMPTON PARK
3028	0.48	1	VIC	ALTONA MEADOWS, LAVERTON, SEABROOK
3067	0.48	1	VIC	ABBOTSFORD
3131	0.48	1	VIC	BRENTFORD SQUARE, FOREST HILL, NUNAWADING
3148	0.48	1	VIC	CHADSTONE, CHADSTONE CENTRE, HOLMESGLEN
3149	0.48	1	VIC	MOUNT WAVERLEY, PINEWOOD, SYNDAL

Reports and Results: Customer Statistics & Demographics

Reports and Results → Customer Statistics → Demographics

The demographics section of your account allows you to see an overall picture on the details you have captured on your database. This section will display a graphical representation of the data you have collected on your customers for each question in your account which has a multiple choice answer.

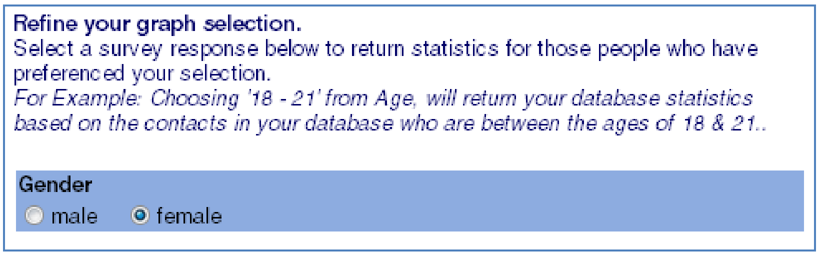
Question Text
As per your personal question set.



Answer Text
Broken into the answers as present in your account, this details how many people are flagged into the answers in your database.

You may search the demographics section to return answers only on portions of your database, such as for instance, only viewing graphs listing information provided by the Females in your account, or by any other question you deem from your question list. Please note, only one level of searching applies.

To do this, scroll to below the last graph in the demographics section of your account. Select the question you would like to define as the filter, and then click on Get Graphs.



Refine your graph selection.
Select a survey response below to return statistics for those people who have preferenced your selection.
For Example: Choosing '18 - 21' from Age, will return your database statistics based on the contacts in your database who are between the ages of 18 & 21..

Gender
male female

When the graphs refresh, the information presented will only be representative of the category of people you selected.

Reports and Results: SMS Delivery Times

Reports and Results → Current SMS Delivery Times

This page is designed to help you troubleshoot SMS delivery should you not receive an SMS to one particular handset. The average delivery times by different mobile carriers can be viewed in your SMART account here. Please note, this information is provided to Impact Data by the varying Mobile Network Providers. Impact Data cannot increase the speed of delivery by any Network Provider.

Current SMS Delivery Times

Once an SMS is sent from the Impact Data system, times of delivery may vary depending on each individual recipients mobile phone carrier and how quickly messages are being sent from that provider at the time.

To look up the estimated delivery time for an SMS to reach one of your customers, simply type their mobile phone number below and click on Find. This will display the customers Mobile Phone Network provider, and then you can see how long it will most likely take to get your SMS to them.

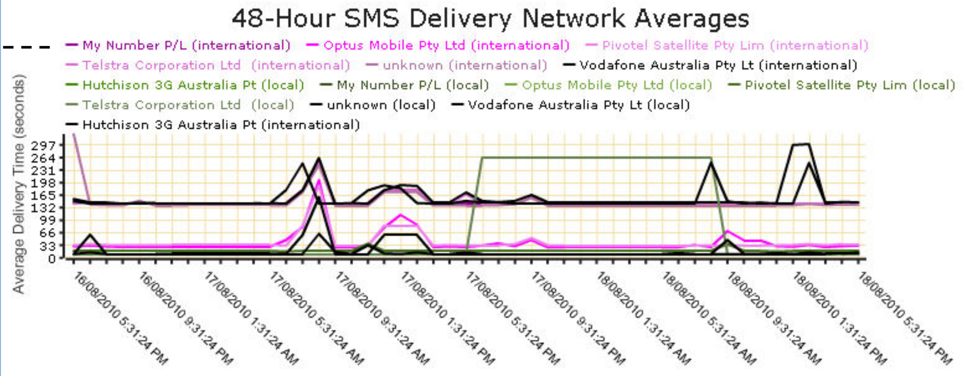
Please note: This information is provided to Impact Data by the varying Mobile Network Providers. We cannot increase the speed of delivery by any Network Provider.

Destination Network	Carrier	Average Delivery Time
Hutchison 3G Australia	International	2:25
My Number P/L	International	2:26
Optus Mobile	International	00:32
Pivotel Satellite Pty Lim	International	00:36
Telstra Corporation	International	2:25
Unknown	International	2:20
Vodafone Australia	International	2:26
Hutchison 3G Australia	Local	00:10
My Number P/L	Local	00:10
Optus Mobile	Local	00:18
Pivotel Satellite Pty Lim	Local	00:18
Telstra Corporation	Local	00:10
Unknown	Local	00:13
Vodafone Australia	Local	00:14

What network is this number on? (Australia only)

Find

Network Search
You can find out what network a certain mobile number is on.



Network Averages
The average delivery times for the different networks over the past 48 hours.

Manage Account

Manage Account: Contact Details

Manage Account → Manage Account Contact Details

In this section you have the ability to modify your contact details and keep your information up-to-date. Please ensure your account billing details are kept up to date to ensure your invoices and statements reach you.

Manage Account Contact Details

Administrative Contact
Contact information for any miscellaneous enquiries should be entered here.

Administrative Details:

Contact Name: Craig

Email (General): hotel@impactdata.com.au

Email (Manager):

Business Phone:

Billing Contact
Contact information for any billing enquiries should be entered here.

Account / Billing Details:

Name of Billing Contact:

Billing Contact Email Address:
(generic is preferred such as accounts@)

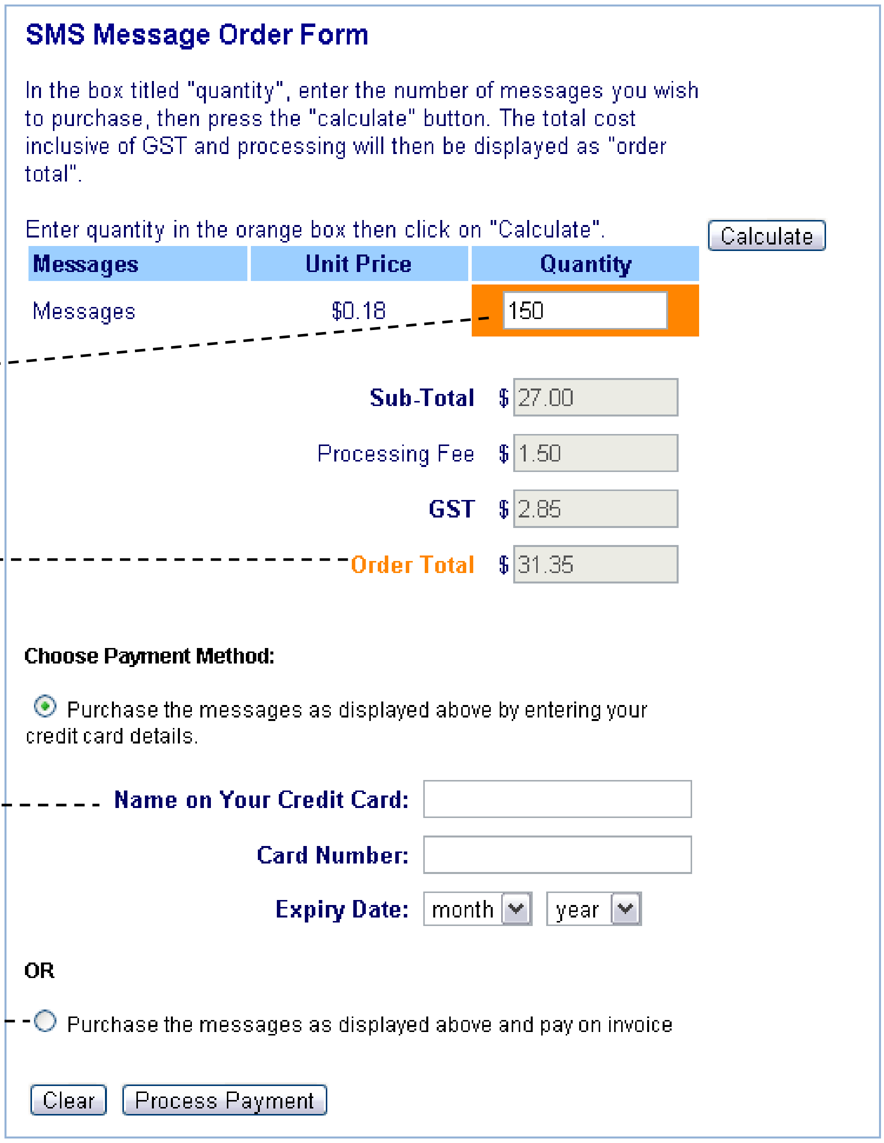
Billing Contact Phone:

Submit Details

Manage Account: SMS Credits

Manage Account → Purchase SMS Credits

You can purchase SMS credits through your SMART-account. One SMS credit is required per message.



SMS Message Order Form

In the box titled "quantity", enter the number of messages you wish to purchase, then press the "calculate" button. The total cost inclusive of GST and processing will then be displayed as "order total".

Enter quantity in the orange box then click on "Calculate".

Calculate

Messages	Unit Price	Quantity
Messages	$0.18	150

Sub-Total $ 27.00

Processing Fee $ 1.50

GST $ 2.85

Order Total $ 31.35

Choose Payment Method:

Purchase the messages as displayed above by entering your credit card details.

Name on Your Credit Card:

Card Number:

Expiry Date: month year

OR

Purchase the messages as displayed above and pay on invoice

Clear Process Payment

Quantity
Enter the number of message you would like to buy credits for and hit "Calculate"

Order Total
Total for this transaction, including processing fee and GST.

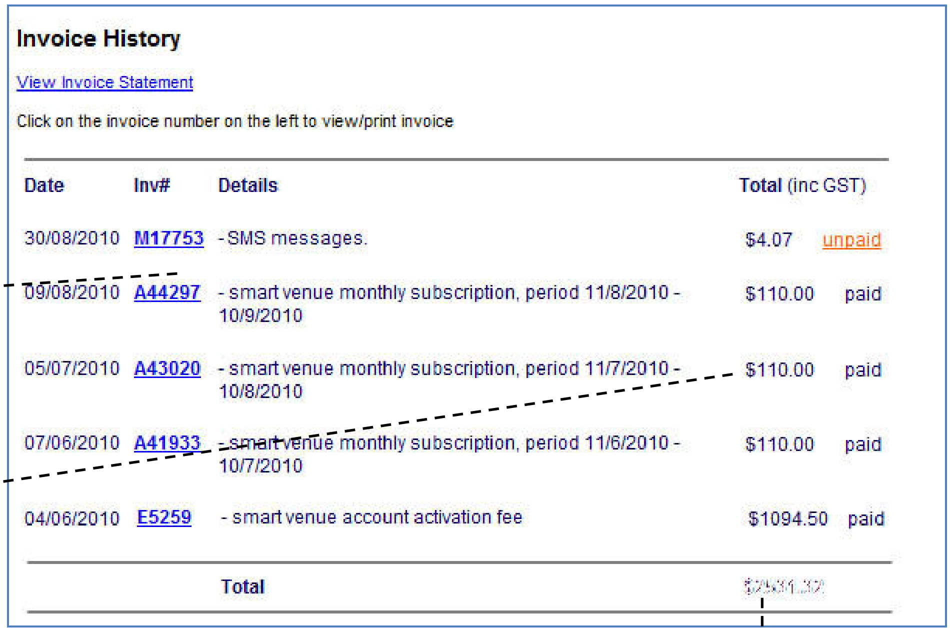
Payment
Credit Card Payment: Insert credit card details to pay with Credit cards. Upon payment your credits will be added to your account.

Payment
Invoice Payment: Invoice payment is available should your account have a direct debit authority. Select Purchase Messages on Invoice to pay via invoice on direct debit. Your message credits will be

Manage Account: Invoice History

Manage Account → View Invoice History

A history and status of all your invoices can be viewed here. A total of all the invoices is also displayed in this section.



Invoice History

View Invoice Statement

Click on the invoice number on the left to view/print invoice

Date	Inv#	Details	Total (inc GST)	
30/08/2010	M17753	- SMS messages.	$4.07	unpaid
09/08/2010	A44297	- smart venue monthly subscription, period 11/8/2010 - 10/9/2010	$110.00	paid
05/07/2010	A43020	- smart venue monthly subscription, period 11/7/2010 - 10/8/2010	$110.00	paid
07/06/2010	A41933	- smart venue monthly subscription, period 11/6/2010 - 10/7/2010	$110.00	paid
04/06/2010	E5259	- smart venue account activation fee	$1094.50	paid
		Total	$2531.32	

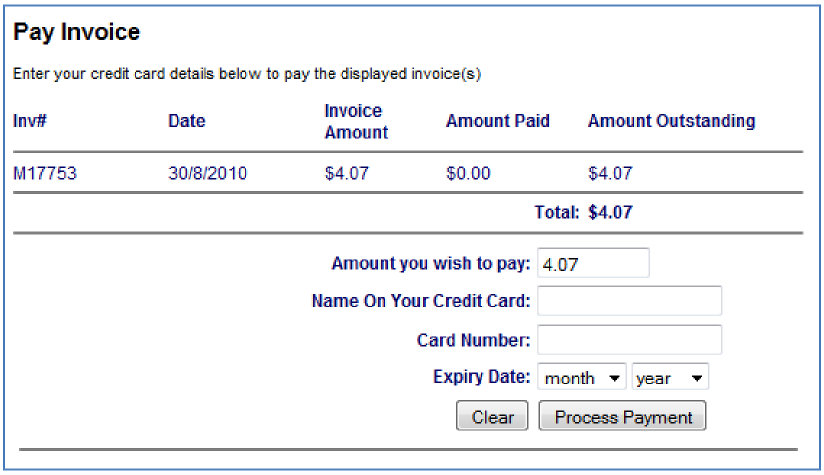
View Invoice
Click to view/print tax invoice

Status
The status of the invoices raised are displayed here. Click to pay an outstanding invoice.

Total
The total of all invoices raised is displayed here

Pay Outstanding Invoice

Click the Unpaid link against any invoice to pay it. The invoice details will be provided. Please complete your credit card details to pay the invoice.



Pay Invoice

Enter your credit card details below to pay the displayed invoice(s)

Inv#	Date	Invoice Amount	Amount Paid	Amount Outstanding
M17753	30/8/2010	$4.07	$0.00	$4.07
			Total:	$4.07

Amount you wish to pay: 4.07
Name On Your Credit Card:
Card Number:
Expiry Date: month year
Clear Process Payment

Manage Account: Sign Up Forms

Manage Account → Manage Sign Up Forms

A paper based sign up form can be generated through your SMART account in this section.

New Forms
New signup forms can be created here (See Drafting a new form)

Load Forms
Previously saved forms can be edited or deleted here.

Download Forms
Existing forms can be downloaded here

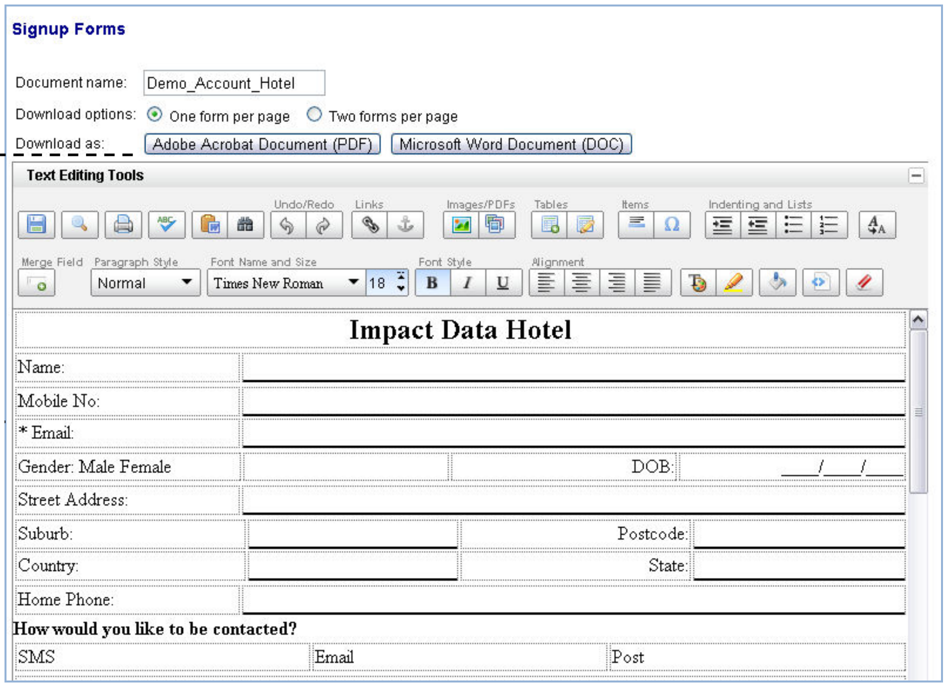
Drafting a new form

When creating a new signup form, the system will preload all the contact fields and profile questions from your question set. The form can then be downloaded as a Word document or a PDF.

New Sign Up Form
Insert name of form.

Download Forms
Form can be downloaded as Word document or a PDF.

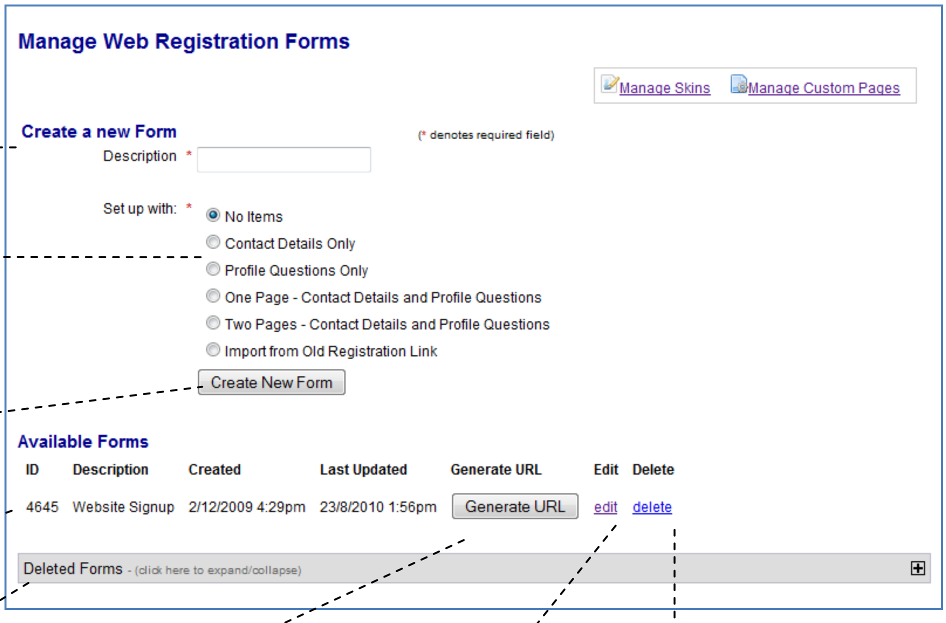
Fields
Contact fields and profile questions are pre-loaded when creating a new form. The form can be customized in the same way as an email



Creating a Web Registration Form

Manage Account → Manage Web Registration Forms

Your SMART account allows you to easily create and customise Web Registration forms within your SMART account without advanced design skills or HTML knowledge.



Create New Form:
Enter a description of the form you would like to create.

Set up with:
Select the default questions you would like on your form. Fields can be added / removed after creation.

Create new Form:
Selecting this option creates a templates form with the above chosen form fields.

Available Forms:
Display of forms created in the past.

Deleted Forms:
Forms which have been previously deleted can be restored.

Generate URL:
Generate the URL for the generated form. This URL can be used on websites or in emails.

Edit:
Allows you to edit the selected form.

Delete:
Delete the selected form.

Generate Webform URL

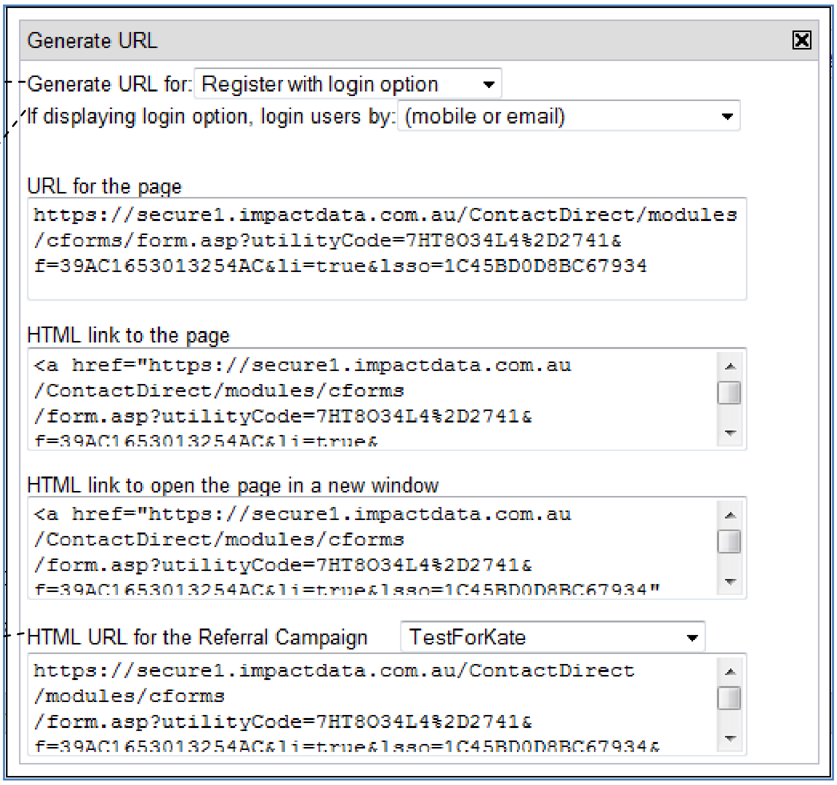
The Generate URL option generates a pre-determined URL where your webform is hosted.

Generate URL:
Importantly, selection can be made as to the URL inclusions, i.e. New Registration Only, Member Log in with registration, or Member log in only.

Display Login Option:
The security level of the member login area. Options are listed below.

URL / HTML:
To view your form simply pastes the URL into a web page. You may insert the form onto your website by using the forms generated here.

Referral Campaign:
Should your web form be connected to a referral campaign, select which referral campaign and select this URL for insertion into your website.

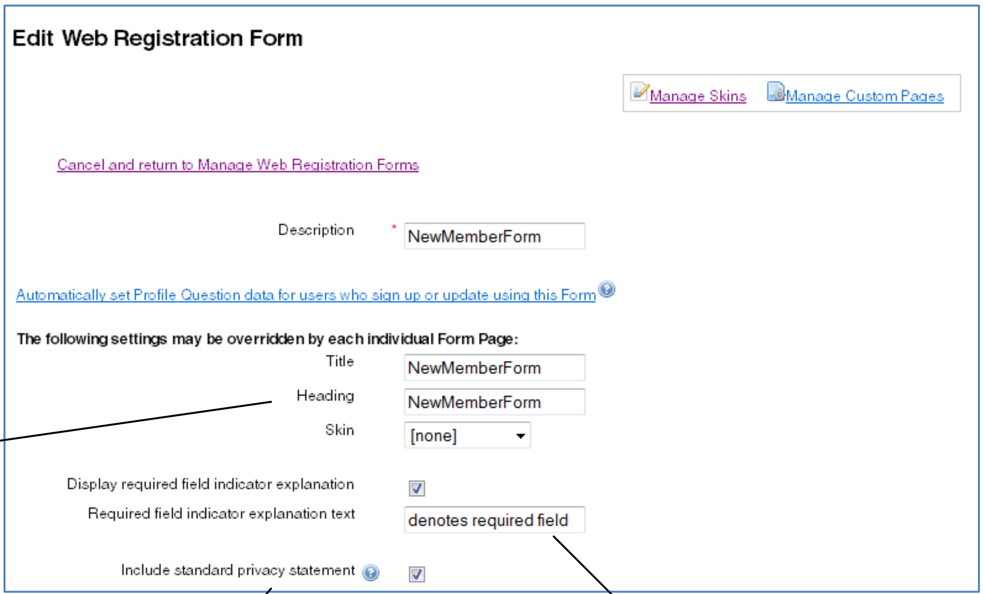


Login Option	Definition
(Mobile or Email)	Contacts need only to present either their valid mobile number or email address to access member options.
(mobile or email) and password	Contacts are required to provide their mobile or email address and the registered password on their profile to access member options.
(mobile or email) and DOB	Contacts are required to provide their mobile or email address and the registered date of birth on their profile to access member options.
Member ID and password	Contacts are required to provide their registered Membership ID and their registered password on their profile to access member options.
Member ID	Contacts are required to provide their registered Membership ID to access member options.

Edit Web Registration Form

Further detail is provided on each section of this area in the following pages.

Edit Form Details



Automatically Set Profile Questions
This option allows you to select 'hidden' fields to reside on your form. This will allow you to flag your customers in your database according to where they have come from for future reference.

Title:
This is the title of your form which will appear when your form opens in a browser window.

Heading:
The Header of your form such as 'Register Here'.

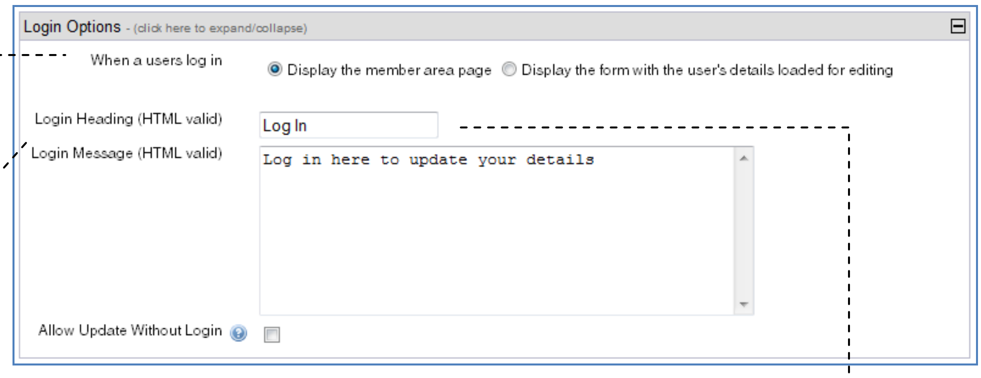
Skin:
Select your pre-made skin to be applied to the form.

Privacy Statement:
This either adds or removed the Standard Privacy statement on the bottom of your form. If you remove it, you can add your own later if you wish.

Required Field Settings:
This allows you to have a 'Required Field' description on your form, i.e. * *denoted mandatory field*. You may change this text or remove the explanation all together.

Member Login Options

This section allows customers to enter into your Web Galley, Update their details, or Opt Out from your database. It is not required that you format this section if you are not using your Member area.



When User Logs In:
Upon log in to a form, the customer may be presented with either a 'Member area' offering members access only links, or they can be directed straight to the Web Registration form with their details pre loaded for editing.

When User Logs In:
Traditional HTML can be used to customise the Login message above the log in input fields.

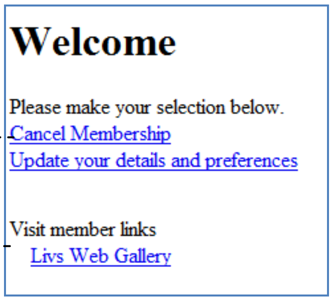
Login Screen Heading
The heading as it appears at the top of the Member Log In option on your web form. You may use HTML to customise this text if you wish. Inline HTML valid only.

Member Area Options

Example Member Area example (no formatting)

Member Area:
Contacts can cancel or update their information stored in your account. Only the fields on your configured web form will appear.

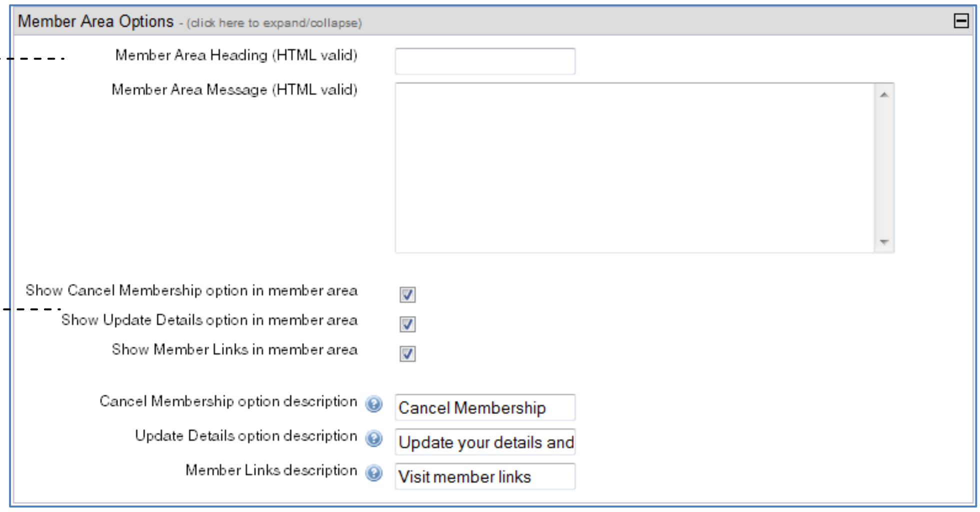
Member Links:
Log in to view Web Gallery



Member Area allows you to edit the area your members will see upon login.

Member Area Heading:
Upon log in to a form, the contact may be presented with either a 'Member area' offering members access only links, or they can be directed straight to the Web Registration form with their details pre loaded for editing.

Member Display Options:
Select options to display upon a member login.



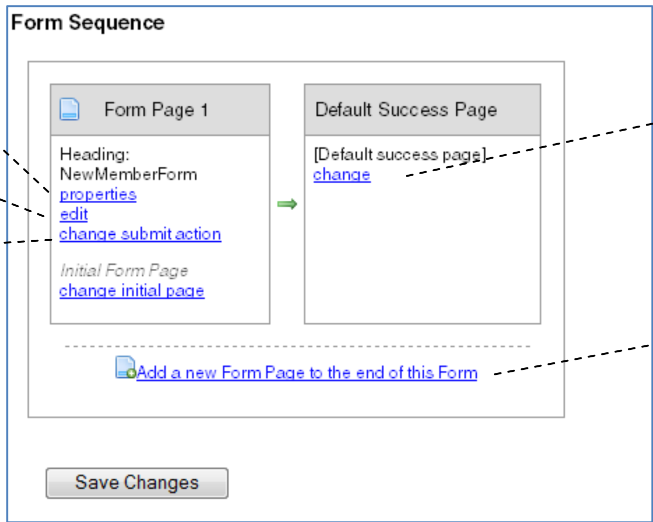
Form Sequence

Click on the Edit button to change the elements in your form (such as removing or adding additional questions).
Click on Change Submit Action to change the page your form goes to when your customers have successfully completed the form.

Properties:
Edit Page Properties

Edit:
Edit this form page

Change Submit Action:
Upon submitting this page, select the next page to appear.



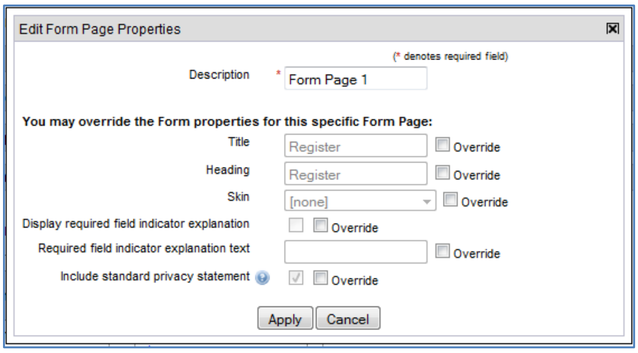
Change Success Page:
Change the page which appears upon successful completion of this form.

Add New Form Page
Add an additional page to the form sequence.

Form Sequence Options

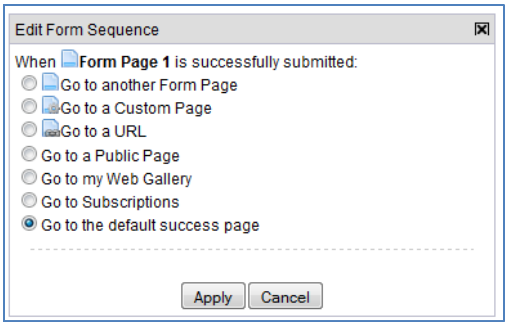
Form Sequence: Form Page: Page Properties

Upon clicking on Properties for any given form page, you may override master properties for that form on the single page.



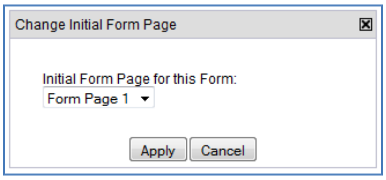
Form Sequence: Form Page: Change Submit Action

Upon clicking Change Submit action you can change the next page a member is sent to upon completing that page of the form.



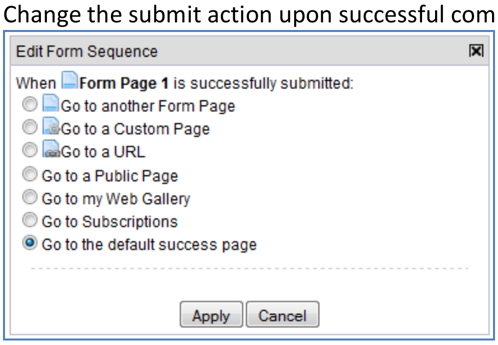
Form Sequence: Form Page: Change Initial Page

The first page of the form can be changed by clicking Change Initial Page on the first page of the form. Select another form page to move to the front of the form sequence.



Form Sequence: Default Success Page

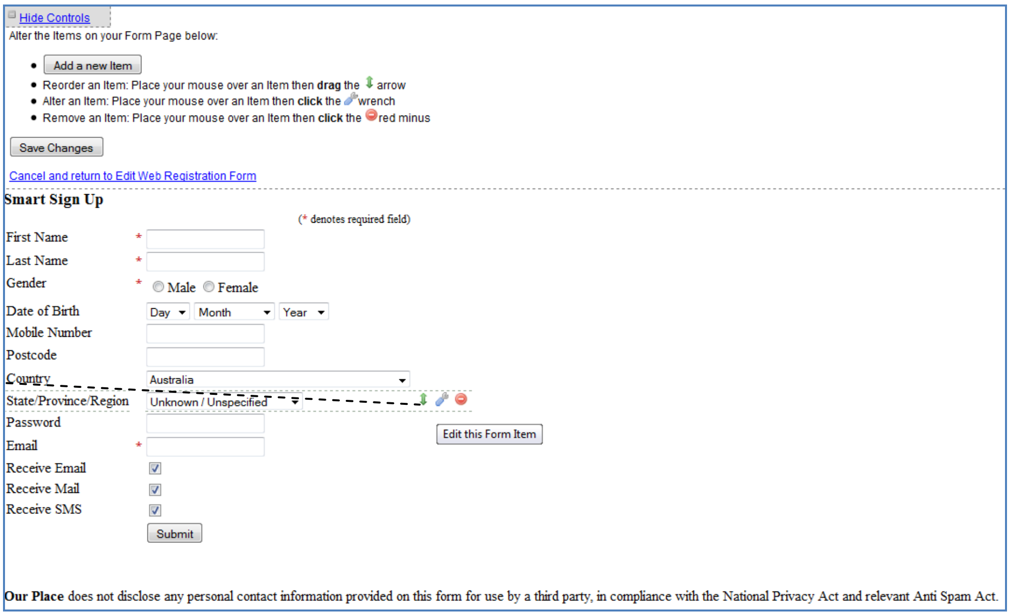
Change the submit action upon successful completion of the form.



Edit Form Page

Form Sequence: Form Page: Edit: Edit Field

By selecting Edit on any form page you may individually change the way that form page and its fields appear.

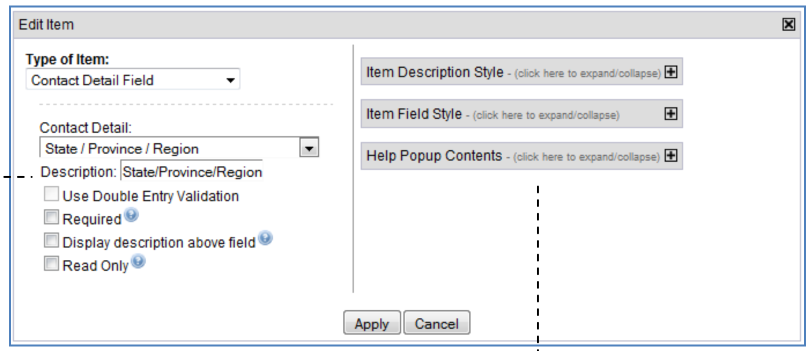


Edit Field
Edit the individual form element.

Move Field
Reorder the display of the form fields by clicking and dragging the form element with your mouse.

Delete Form Field
Delete a form field by clicking the red circle.

Edit Form Fields: To edit an individual form field simply mouse over the desired field and then click on the spanner icon which will appear upon mouse over. The following form options will appear:



Description:
The form name as the public will see.

Use Double Entry Validation:
If selected the field will appear twice. Contacts must enter the same details into each field in order to successful complete the form.

Required:
Make a form field mandatory for completion.

Display above field:
Display the answers to the question below the question text instead of the default side by side.

Read Only:
Upon presenting members with their existing stored details in this form, check this to ensure the member cannot change their details in this field.

Item Description Style:
Change the question text formatting for this field.

Item Field Style:
Change the answer formatting for this field.

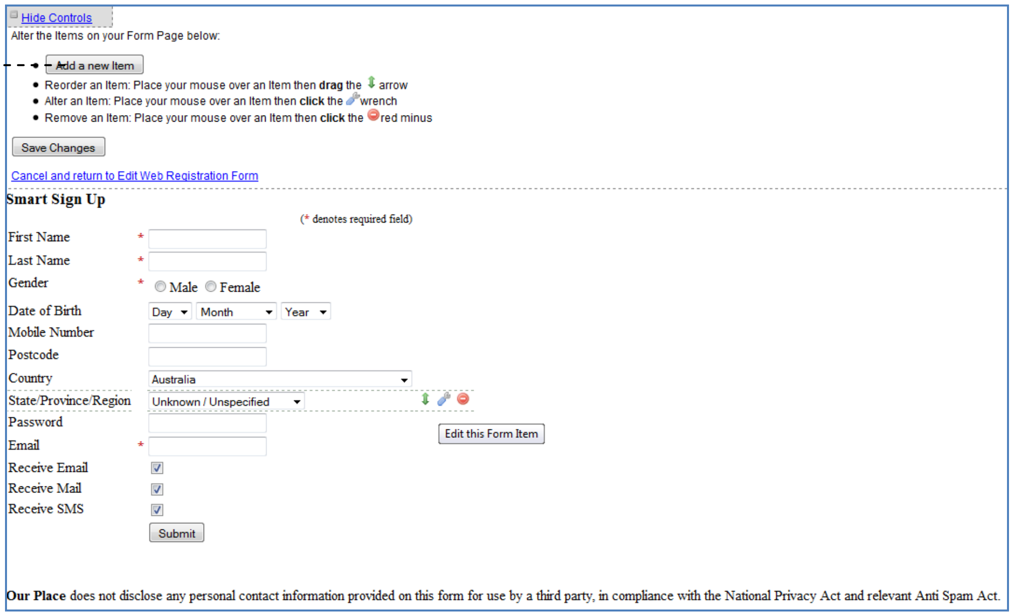
Help Popup Contents:
Inserts a help icon next to the field within the form. Insert the Help text here. (Note the help Icon cannot be changed)

Add new form item

Form Sequence: Form Page: Edit: Add a new item

Add a new item to the form.

Add a new item
Click to add additional items such as a new form field or picture to your form.



Add Form Item: Each form item can be individually styled upon insert into the form.

Input Item Types	Definition
Contact Detail Field	Allows you to insert the general contact detail fields available in your account.
Profile Question Field	Allows you to insert the general profiling fields available in your account.
Table Question Field	Insert a table question such as a purchase history question.
Non Input Item Types	
Subheading	Subheading text.
Text	Plain Text.
Link	HTML Link URL and Link Text
Image	Insert an image from URL (URL must be provided)
Arbitrary HTML	Additional HTML to add to the page.
Submit Button	Form Submit button
Vertical Gap	Vertical Gap insert for spacing
Refer a Friend	Refer a friend boxes for referral campaign

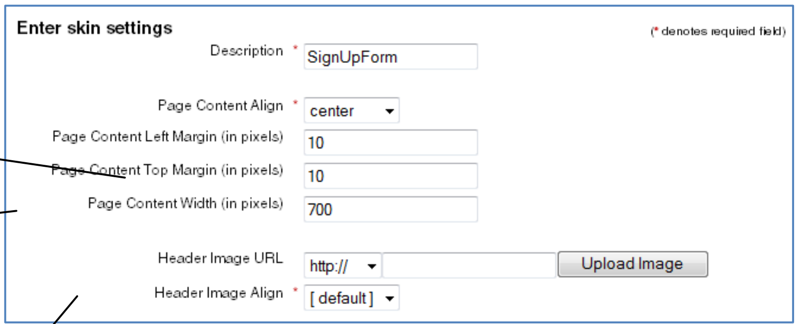
Create your form Skin

Manage Account → Manage Public Pages & Skins

Create a ‘skin’ to use on a web registration form.

Step 1: Give your new skin a description and click on ‘Create New Skin’

Step 2: Select the settings for your skin.



Page Content Align
This will align the content of your page. You can choose to either center your form in the middle of a page, to the left or to the right.

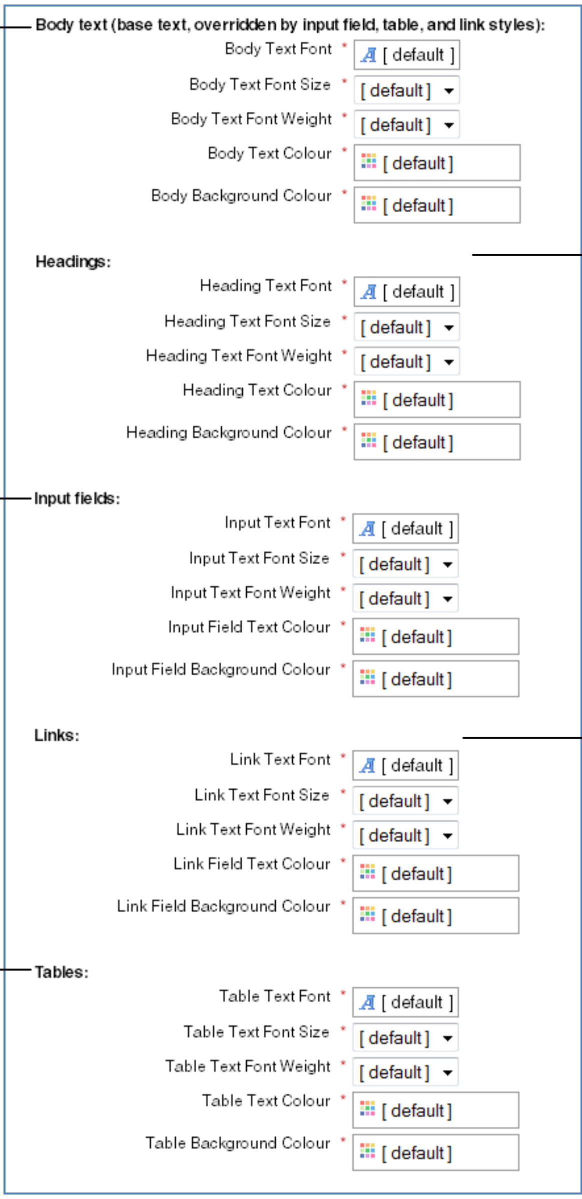
Margins:
This is the padding around your form to the left and top of it. The high the number the more your form will be pushed to the right of the page and further down the page.

Page Content Width:
This is the width in pixels that your form can spread over a page.

Heading Image Align
This will align the heading image you have placed on your form.

Heading Image URL
Click on Upload Image to upload an image to be inserted at the top of your form. This is usually a Header Banner. You can upload an image directly from your computer.

Step 3: Select the font, font colors and background colors for your form.



Body text (base text, overridden by input field, table, and link styles):

Body Text Font * [default]
Body Text Font Size * [default]
Body Text Font Weight * [default]
Body Text Colour * [default]
Body Background Colour * [default]

Headings:

Heading Text Font * [default]
Heading Text Font Size * [default]
Heading Text Font Weight * [default]
Heading Text Colour * [default]
Heading Background Colour * [default]

Input fields:

Input Text Font * [default]
Input Text Font Size * [default]
Input Text Font Weight * [default]
Input Field Text Colour * [default]
Input Field Background Colour * [default]

Links:

Link Text Font * [default]
Link Text Font Size * [default]
Link Text Font Weight * [default]
Link Field Text Colour * [default]
Link Field Background Colour * [default]

Tables:

Table Text Font * [default]
Table Text Font Size * [default]
Table Text Font Weight * [default]
Table Text Colour * [default]
Table Background Colour * [default]

Body text:
Body Text Font: This will be the default font for any text fields on your form. These setting are, overridden should you choose Input, Table and link styles below.

Headings:
These settings configure the text and colours for any Headings on your page. These are generally made to be bolder or larger than the rest of the text on your page.

Input Fields
These settings configure the text as seen by your customers when they type into the registration boxes for instance when they type their first name.

Links:
Any links which appear in your form will appear as per this formatting. You can insert links when you create your form.

Tables:
This will format any of the text in your form. This will override the Body Text as above.

You will notice at the bottom of the page some Advanced skinning options. Your web developer or graphic design team can use these fields if required. They are not however necessary to complete your form.

Once you are happy with your Skin, click on Save Changes.