

# **NETWORK BUSINESS SYSTEMS**

## **SOFTWARE SYSTEM DOCUMENTATION**

### **INTERNAL/EXTERNAL MAILING MODULE**

#### **FEATURES**

##### **INTERNAL MAILING LIST**

- Allows entry of names into mailing list and not Customer Master account entry
- Will not allow entry of ID that conflicts with Customer Master ID
- Provides for demographic studies
- Automatic prompted entry into the catalog mailing form can be created directly from Customer Master File for fast, correct transfer
- Spools customers for batch printing and updating to mailing history
- Advertisement yard code analysis
- User-defined list viewing and printing
- All mailing lists print in zip code order for bulk mail
- Can generate labels for buyers of certain inventory
- Media Code field for printed material controls, prints on labels, Global change capability

##### **EXTERNAL MAILING LIST**

- Program driven entry of any outside mailing list in "ASCII" file format, line or comma delimited
- Comparison program to flag matches between Customer accounts and External mailing list
- Print or display of no-match report, both Customer accounts or External mailing list
- Storefront mishap status flag for wholesale system
- Edit of External mailing list records

##### **INTEGRATED WITH:**

- Customer account system
- Retail, Distribution, and Telemarketing systems

##### **SYSTEM OVERVIEW**

The IBS mailing list system combined with the customer master system can be used to track all customers for major mailings and demographic studies, or used for a one time mailing system for lead generation. The system interacts with the customer master file and maintains the same customer ID number for direct relationship to each other. This relationship can provide instant data as to what type of leads (yard code controlled) generate sales from where, with full profit tracking!

##### **ONE TIME MAILING**

You can use the mailing system for one time mailing, such as for a catalog, then you can enter in names in both the customer master system and transfer over to the mailing system for mailing. You would also then enter in inquiries for product information in the mailing list system and then make periodic mailings of recently added customers. The system maintains a printed flag and date when labels are generated. Each time you run the labels all non updated records will carry the new date with the printed flag set to yes. As mailing list inquiries turn

into actual buying customers, use the automatic transfer capability to turn the mailing list customer into a live sales customer.

### **INTERNAL MAILING LIST**

IBS's Mailing module enhances all sales systems by providing a powerful user-defined mail communications system fully integrated into the customer management system. Combined with the extensive customer account data, management has unlimited capability to focus sales and marketing campaigns toward specific targets. This could be for existing and new product activity. Input includes advertising yard code for analysis of response to published advertisements or any specific identified marketing campaign. A yard code is a four character code you set up in the program "Advertising Yard Code Maint.)/(YARDCODE). There are sales analysis reports and mailing list reports by yard code for sales and demographic study. One of the most powerful features is the ability to enter customers into the main customer master file, and then automatically transfer that customer into the mailing list system to allow mailing to "NEW" customers. This allows you to have your own definition of "FIRST TIME MAILING INFORMATION" such as, your new color brochure. Again, you can separate the customer into retail, dealer, and wholesale so you can also control what pricing you may want to also send to the "NEW" customer. Further, the advertising yard code required to be entered for each new customer will allow you to track where your customer came from! The mailing list customer will have the same ID as well as all other information.

Conversely, you can create a sales customer in the customer master file by using the program "Mailer Customer File Maint:MAILGUT". If the program detects that this mailing list customer does not exist in the customer master file, then it will present the opportunity to transfer, with the same ID number. This provides for the demographic studies your business can use to direct sales and marketing activities.

After the first time mailing, you can now selectively mail your customers as many times as you want in a user-defined range of customers. The most recent mailing date is automatically updated to the customer master file when a mailing list is generated.

You can also enter customers into the mailing system only, and not make them a full sales customer. In other words, you do not have to assign them account terms and fill out all the extensive data required in the main customer master file. This may be used for retail catalog inquiries for instance. Again, advertising yard code will help you track where the inquiry came from.

Another key function is the ability to output the mailing list to a pre-defined ASCII file on disk. The new high-tech print shops can read this file directly into their computer for merge printing on your mailing document. This can save considerable time in peeling labels and sticking them on the printed mailer.

### **CUSTOMER MASTER FILE MAILING**

The IBS Mailing List system also provides a program that allows you to set up an extremely diversified customer selection of mailing labels, from the customer master file. This program is called "User Defined Mailing List:CMASSTLBL".

## **SYSTEM BASIC OPERATIONAL FLOW/INTERNAL**

1. **Catalog Mailing List System/MAILER**....Print mailing labels for new customers receiving your Company information. This program allows you to enter in full customers, enter in mail inquiries only, print labels selectable by customer type, and look at the number of names entered not printed.

2. **User Defined Mailing List/CMASLTLBL**....Print mailing labels for groups of customers as needed. You can also output in a line delimited fashion in a file, so that you can send the data to a advertising shop or print shop who will be able to automatically read this data into their system, eliminating costly type in and giving you the ability to custom generate mailers.

## **SYSTEM BASIC OPERATIONAL FLOW/EXTERNAL**

1. **Match Internal to External:YPMTCH59/Match External to Internal**....Run one of the match up programs that matches up the smallest list to the largest list. For example, if you customer master file has 10,000 records in it and your external list has only 300 new names in it, then it will obviously take less time to match the external list to the customer master list.

2. **Delete External Records/YPDELETE**:....You will probably want to delete all matched customer as soon as you have completed the job.

## **SYSTEM SETUP REQUIREMENTS**

You will need to fulfill all the setup requirements necessary to operate the "CUSTOMER ACCOUNT FUNCTIONS". Additionally, if you are going to take advantage of sending the mailing list to an ASCII file for the purpose of exporting the data to another system, then you will need to set up a file name in the user defined printer output file. This program is called "Printer Setup"/(PRINTER).

You will need to purchase mailing labels that are exactly according to these specifications: 3.5" X 15/16".....1 ACROSS. No other labels will line up correctly. You can also find this information in the REFERENCE manual.

In order to use the external mailing list system, you can only work with DBASE III files or ASCII files, line or comma delimited. The first step in using this system will be to place the external mailing list file in your working database directory. You will need to consult with you system administrator or a qualified IBS representative to do this. You must also have a full Dataflex development license in order to do this because Dataflex will create a program that will automatically read the external mailing list file into your Dataflex external mailing list file. This program must be compiled in order to operate. The compiler program is called DFCOMP.EXE and is a critical program to this project. NOTE: The name of the Dataflex external mailing list file is called YPLIST and is file number 13.

If the external mailing list is in DBASE III format, then you will use the Dataflex provided program DBREAD to read that external data into our system.

If the external mailing list is ASCII, either line delimited or comma delimited, then you will use the program READ.EXE to read that external data into our system.

After you have successfully read the new external list into your Dataflex external mailing system database, you are ready to operate the system.

## **MENU STRUCTURE/PROGRAM DOCUMENTS**

- 2. SALES/CUSTOMER MGMT MENU #1
- 5. MAILING LIST FUNCTIONS MENU #1
- 1. INTERNAL MAILING LIST MENU #1
- 1. Catalog Mailing List System: MAILER
- 2. Yard Code Analysis/Mail Inq.: ANALMAIL
- 3. Labels for Buyers By Part #: SOLDLABL
- 4. User Defined Mailing List: CMASTLBL
- 5. Mailer Customer File Maint: MAILGUT
- 6. User Defined Output to ASCII: CMASTFIL
- 7. Reset Mailing List Print/Date: MAILSET
- 8. Clear Out Mailing List File: MAILCLR
- 2. EXTERNAL MAILING LIST MENU #1
- 1. Match Internal to External: YPMTCH59
- 2. Match External to Internal: YPMTCH00
- 3. Prt Nomatch Ext List Postcards: YPPRTRCD
- 4. Prt Nomatch Ext List Rpt.: YPPRTRPT
- 5. Set External Stocking Flag: YPSTKSET
- 6. Move Internal Stock to Externl: YPSTKAUT
- 7. Edit External List Records: YPEDIT13
- 8. Delete External List Records: YPDELETE
- 9. EXT MAILING LIST RPTS MENU #1
- 1. External Listing by ZIPCODE: YPLIST1
- 2. Internal Listing by ZIPCODE: YPLIST2
- 3. List of NoMatch Ext. by ZIP: YPLIST3
- 4. List of NoMatch INT. by ZIP: YPLIST4
- 3. STAND ALONE MAIL LIST MENU #1
- 1. Enter/Edit Stand-Alone System: MLSENTRY
- 2. Mailing List Labels by Name: MLSPRNLB
- 3. Mailing List Labels by Zip: MLSPRNLB