

EFFICACY MARKETING WITH FLEXMAIL TRAINING

Scope

This hands-on training presents the Marketing Module in combination with the Profiles Module and Flexmail as an E-mailing Tool. It teaches the participants to manage Newsletters and Events, with the focus on preparing and sending the E-mailing Campaign.

Target

End users with a few months experience with Efficacy.

Required knowledge and aptitudes

Knowledge about Efficacy Queries and E-mail Templates is necessary.

Number of participants

Minimum 2, maximum 6.

Duration

6 hours (can be reduced to 4 if the participants already know Flexmail, if there is no Guest Page, if there is no need to see the (e-)Mailing via Efficacy)

Contents

For dedicated trainings, the **purple topics** need to be specified.

- Starting point: Contacts / E-mailing
- Managing Newsletters
 - Process
 - Creating a Profile
 - Linking Contacts to the Profile
 - Via Search
 - Via Query
 - Import from other Profile
 - Import from a Publication
 - Subscribing/Unsubscribing a Contact
 - Robinson Contacts
 - Preparing the Campaign
 - Automatic filters
 - Filling in the Publication
 - **Customer's Specific Fields**
 - Linking Contacts to a Publication
 - The E-mailing Wizard
- Using Flexmail
 - Creating a new message
 - Customizing the message with fields from Efficacy
- Managing unsubscriptions and bounces

- Managing Events
 - Process
 - Creating a Profile
 - *Category Emailing*
 - Linking Contacts to the Profile
 - Preparing the Campaign
 - Automatic filters
 - Filling in the Publication
 - *Customer's Specific Fields*
 - Linking Contacts to a Publication
 - Status of the Contacts
 - Filtering the list of linked Contacts
 - The E-mailing Wizard
- Using Flexmail
 - Inserting the hyperlink to the Guest Page
- *The Guest Page*
 - *Managing registrations*
 - *What happens when a contact modifies his data on the form?*
 - *Customer's Specificities*
- Managing registrations manually
- Managing unsubscriptions and bounces
- *Customer's Specific Use of Profiles and Publications (Organization of Committees,...)*
- Other ways of contacting your recipients
 - E-mailing via Efficacy
 - Global e-mail
 - Paper Mailing: Merge and Print wizard
 - Classical Mail Merge in Word
 - *Customer's Specificities: Fax mailing,...*
- Keeping a trace in Efficacy
 - Saving the test e-mail
 - Creating a global action
 - Generating Actions
 - Generating Documents

Training support

On-screen PowerPoint presentation and live use of a standard Efficacy database

The trainees use online handouts of the presentation during the training. These online handouts are available through the Efficacy Helpdesk.

Upon request, printed versions of these handouts can be provided for use during the training. For environmental reasons, this service will be charged.

On-line manuals available on <http://help.efficacy.com>

Available languages

The training can be given in English, French, Dutch or German.

Certificate

Not available yet.