CORETRAC

ResourceOne - Marketing Manager Guide

Version 4.0

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Introduction

Introduction

The Marketing Manager is an optional module of ResourceOne. With the Marketing Manager, you can:

- Use filters to create contact/activity lists.
- Run reports or output lists you created to Excel, Word/mail-merge, .PDF or .CSV files.
- Create events or pipelines for distribution to employees so they can cross-sell to the contact lists you created.
- Create lists of products to recommend to contacts using the ResourceOne pop-up.

Glossary of Terms

The following terms will help you understand the Marketing Manager tools.

Term	Definition
Contact	Any person or company in ResourceOne.
Prospect	Contacts (commercial or retail) that do not have any open accounts.
Customer / Member	Contacts (commercial or retail) that have or have had at least one open account.
Lists	Any list that is created using the Marketing List tool to filter contacts by using defined criteria. All marketing Lists can be re-used.
Activity List	List created using the Marketing List tool that are filtered based on production account fields or pipeline fields.
Contact List	List created using the Marketing List tool that are filtered based on contact information fields and/or profile fields.
Campaigns	Marketing lists are created by the Marketing Manager tool and then imported into the Campaigns tool for distribution. Campaigns can be used to distribute a combination of pipelines, events and recommended products to employees or queues.
Pipelines	Pipelines are Opportunities that can be created and distributed to employees by importing marketing lists and then creating campaigns. More details on pipelines can be found in the *ResourceOne Users Guide*.
Events	Events can be created through marketing campaigns and distributed to lists of employees.
Product Recommendations	Lists can be created to identify contacts that qualify for certain products. Once the filters are included and the contact list is created, products can be recommended to those contacts and those recommendations will be displayed within the ResourceOne pop-up.

Prepare for the Campaign

Answering the following questions will help you get a clear idea of the kind of campaign you want to create and how to enter in the correct filters to get the results you want.

What would you like to do?

- **Create a list of contacts that meet your defined criteria and print a report?**

  1. Create a marketing list.
  2. Export the list to create a report.

- **Create a marketing campaign and distribute pipeline opportunities and/or events for employees to call on?**

  1. Create a marketing list if the list does not already exist.
  2. Create a campaign and import the list.
  3. Create opportunities and events for distribution within the campaign.

- **Identify contacts that qualify for certain products? Present those recommended products to employees so that they can recommend them during contact communication?**

  1. Create a list to identify the contacts you would like to recommend products based on the rules you define.
  2. Create a campaign and import the list.
  3. Define the product recommendation and an optional script for employees to recite while presenting this new product to contacts.

Defining a list: What type of list do you want to create?

- **Contact Information** – "I want to see all contacts that live in zip code 78748" or "I want all retail customers who have a birthday in the month of May".
- **Account / Pipeline Opportunity Information** – "I want to see all checking accounts with a balance greater than $5,000" or "I want to see all opportunities that are currently in the 'Qualified' sales stage".
- Write down the fields that will be used to filter this information down to the targeted list.

Note: Prior to building the list using the marketing list tool, open a contact record, pipeline opportunity, or a production account page inside ResourceOne. Look at the fields displayed on those pages that are relevant to the filters you would like to apply. Verify that they exist on these pages and take note to what pages those fields are on. Example: "I want to see all contacts that live in zip code 78748." Open a contact record, note that there is a zip code field and it is found on the contact information page.

Defining a campaign:

- Define a list first - Do I know the filters I am going to use to create my list to market to?
- Who will be responsible for marketing to these contacts? Queued group of Employees, Employees by branch, role, department, individual few, or all employees?
- Distribution – Do I want to distribute pipeline opportunities and/or events to this set of employees? What is the product type or product that the pipeline will be created for? What should the event be named to identify how it was originated and what date/time should it be scheduled to occur?

Define products to recommend:

- Product list – What products do you want to recommend?
- What parameters define that a contact qualifies for a product to recommend?

  Example: "I want to see all contacts that have a Checking account but do not have a Savings account" – Recommend a Savings account; or "I want to see all contacts that have a checking account with a balance greater than $5,000" – Recommend a Money Market account.

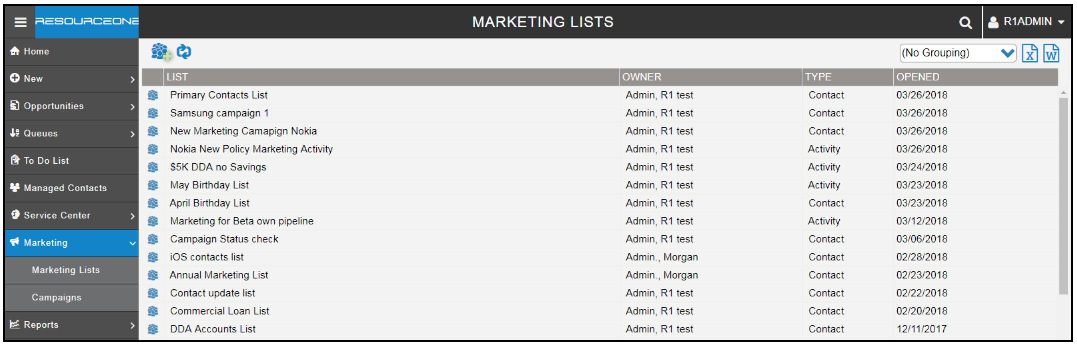
2

Creating a marketing list

Creating a Marketing List

Marketing Lists can be found and created by going to **Marketing > Marketing Lists**.

This page displays all marketing lists that have already been created. From this page, you can select any existing list, open lists and export marketing list data, edit existing list criteria or create a new list.

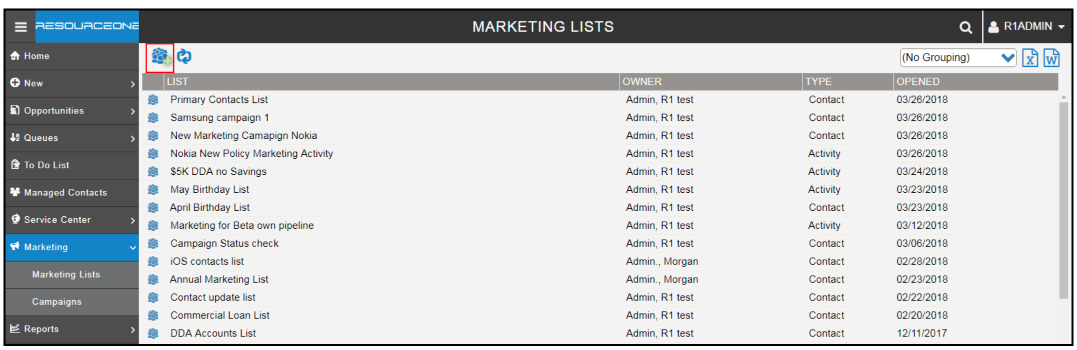


Creating a new marketing list

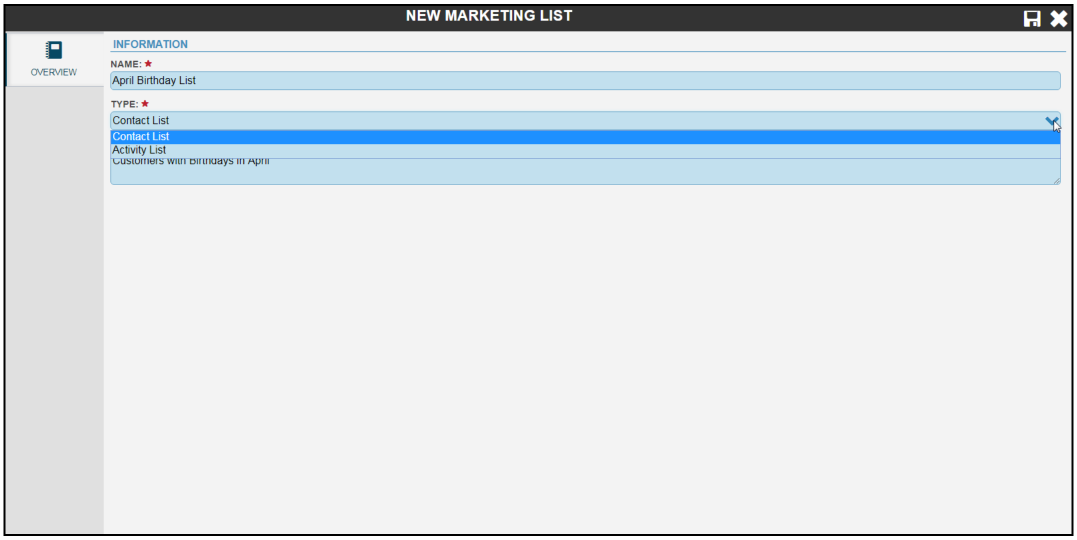
This section provides the information on creating new marketing list.

To create a new marketing list

1. Go to **Marketing** > **Marketing Lists**. The **Marketing Lists** page is displayed.



2. Click the  button. The **New Marketing List** page is displayed.

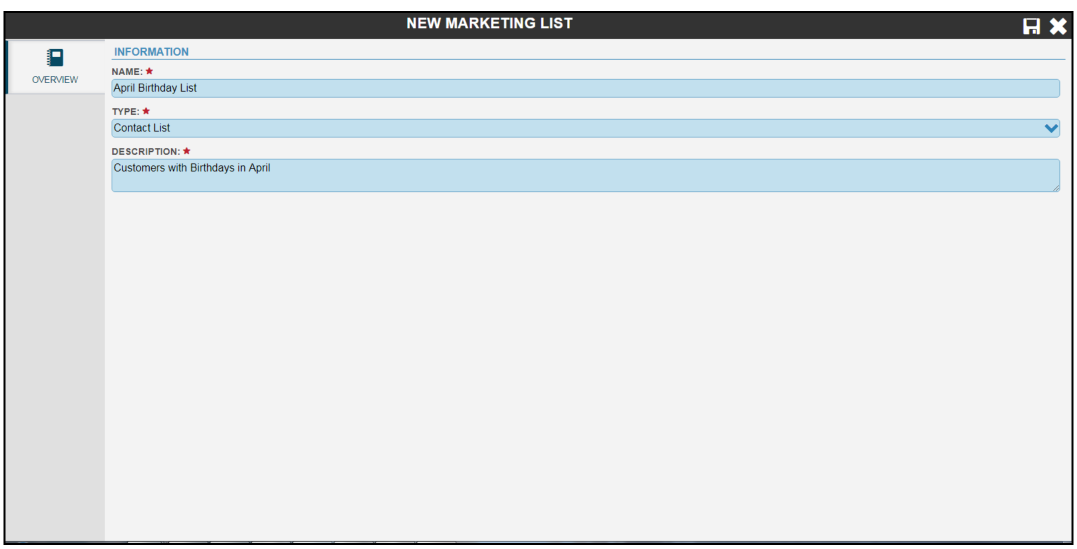


3. Enter the following information

   - Enter the **Name** of the marketing list
   - In **Type**, select the required marketing list: **Contact List** or **Activity List**

> **Note:** Marketing List can be created in a Contact or Activity List. It is important to choose the correct type as this will affect how events are distributed and what fields are available to export.

   - Enter a **Description** of the marketing list.



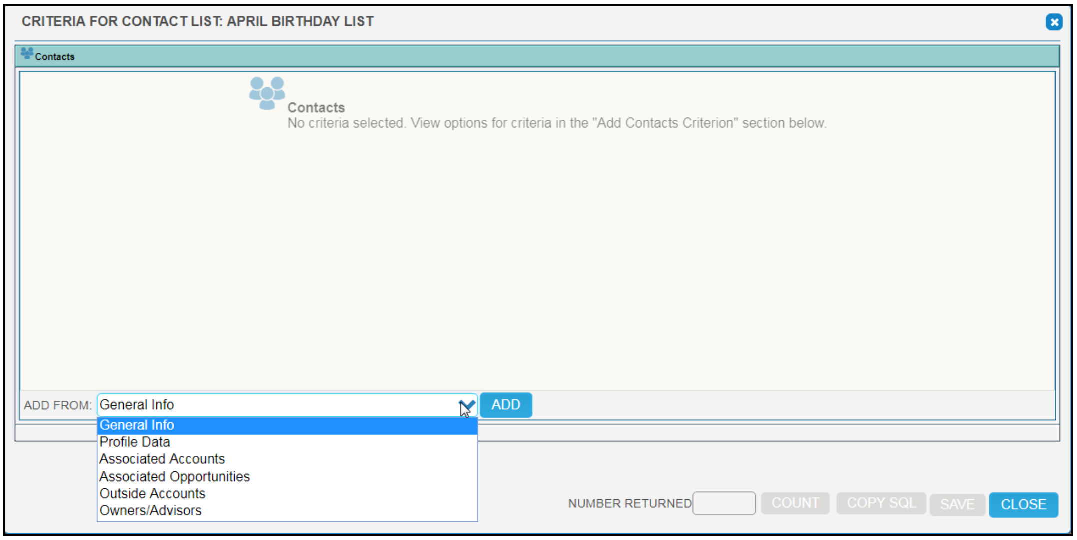
4. Click the  button.

Marketing list criteria options defined

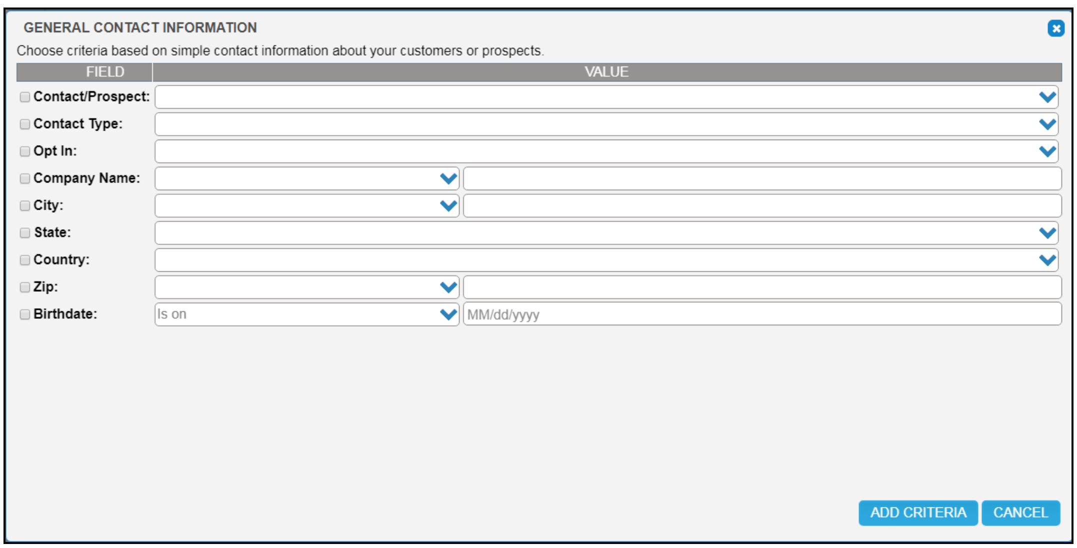
This section provides the information on marketing list criteria options.

Contact Lists Criterion

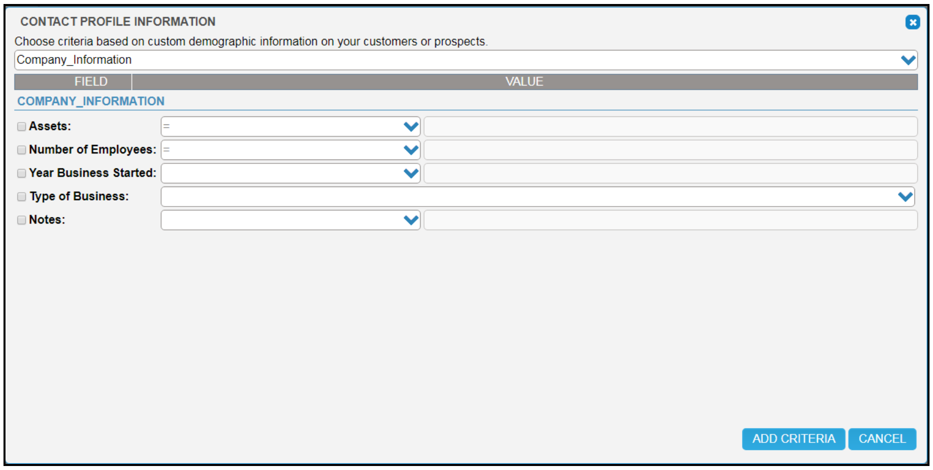
The following image shows the criteria group in Contact List.



- **General Info** –filtered based on the fields from the **Contact Information** Page fields.

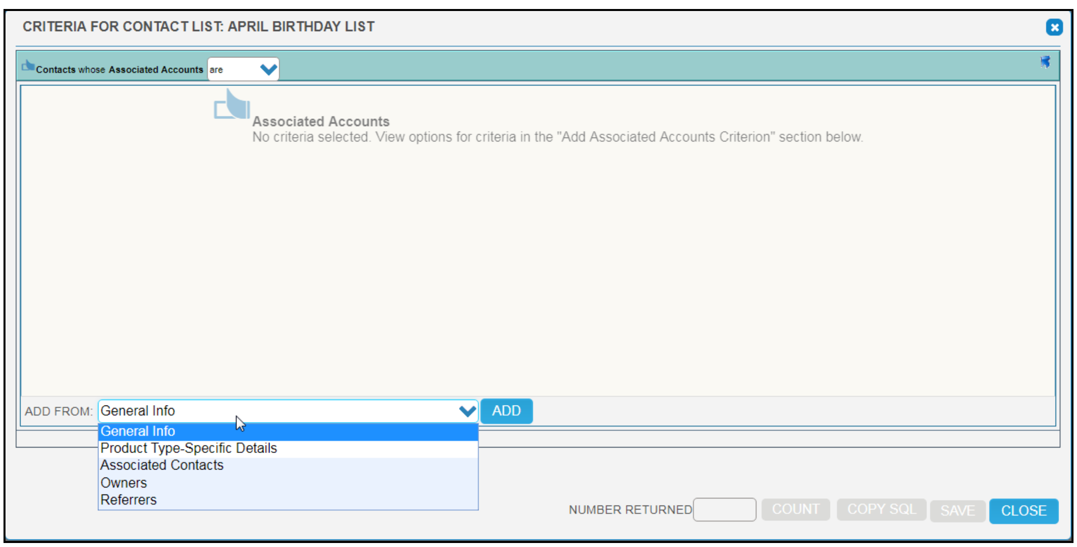


- **Profile Data** –filtered based on the profile fields from the **Contact Profile** page (the fields that you see on this page may vary from our example)



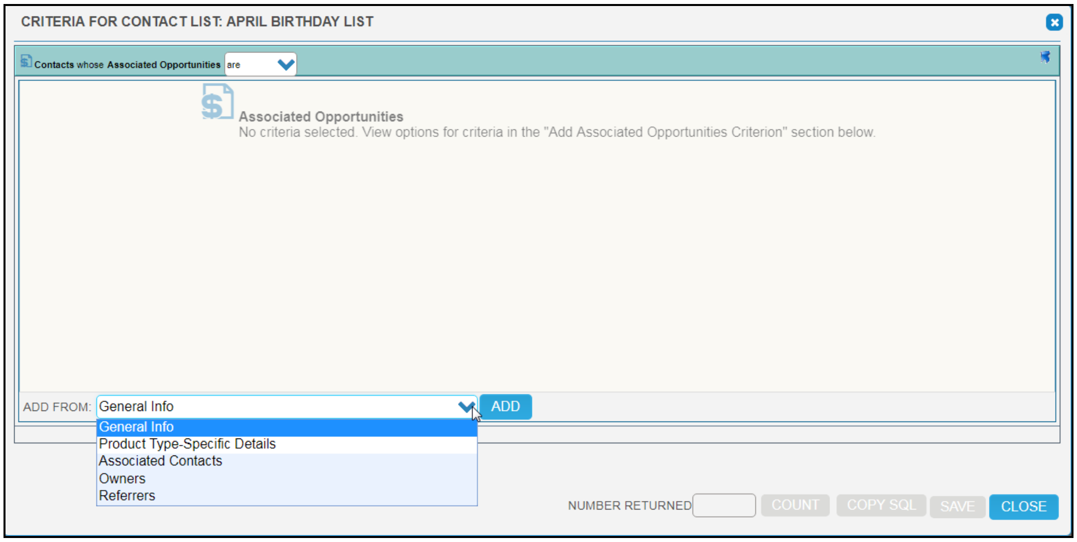
- **Associated Accounts** – will filter based on production accounts and details by allowing you to add **Activity List** based filters.

Note: As you add activity-based filters to a contact type list, you will see a string build at the top of the **Contact List**/**Activity List** page. You can make edits to this string using the drop downs that appear as well as remove any addition by selecting the blue “X” at the top right of the page.

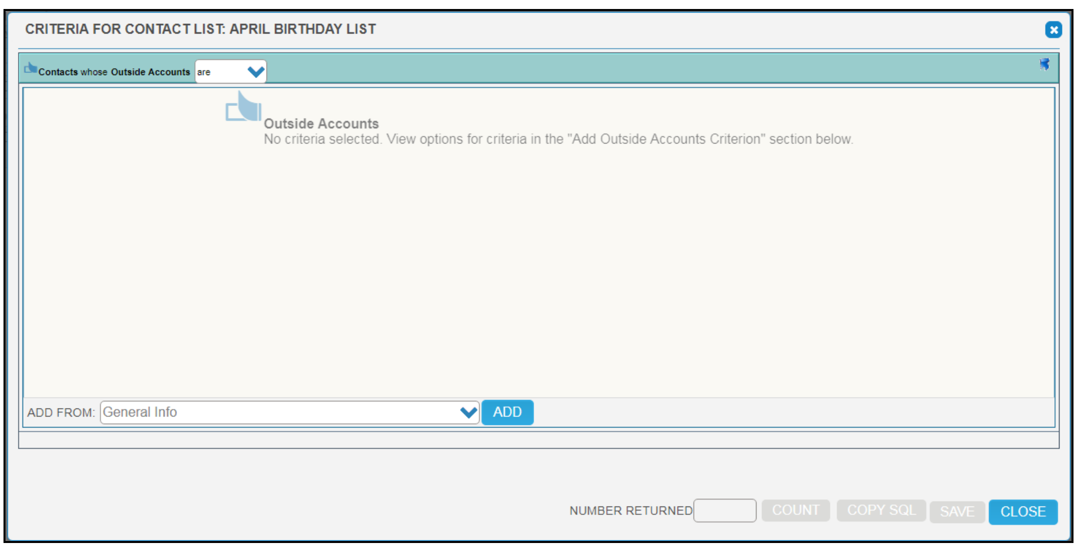


- **Associated Opportunities** – will filter based on pipeline opportunity fields and details by allowing you to add **Activity List** based filters.

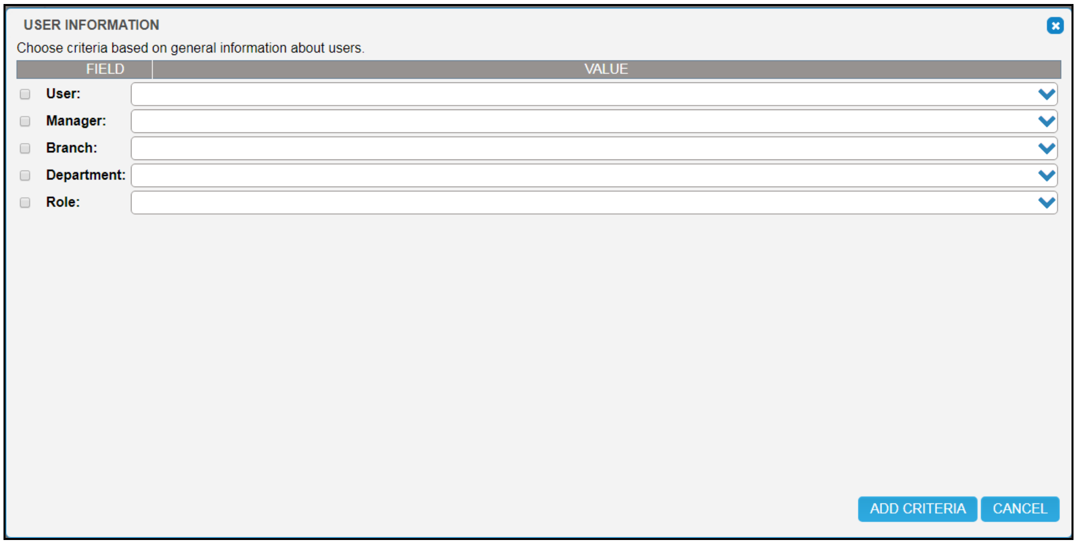
> **Note:** As you add activity- based filters to a contact type list, you will see a string build at the top of the **Contact List** / **Activity List** page. You can make edits to this string using the drop downs that appear as well as remove any addition by selecting the blue "X" at the top right of the page.



- **Outside Accounts** – will filter based on any outside account fields on the profile tab of the contact record (the information is dependent on manual data entry by users).

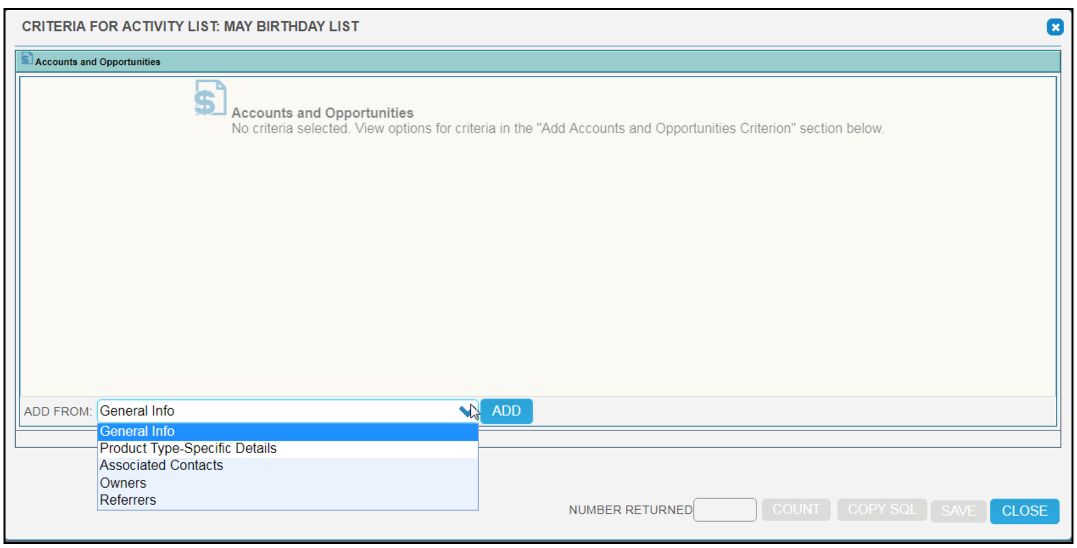


- **Owners/Advisors** – these fields identify if a user manages or owns a contact (customer/member) record. This information is to be fed by a core system in the data extracts and mapped to a field in the ResourceOne database.

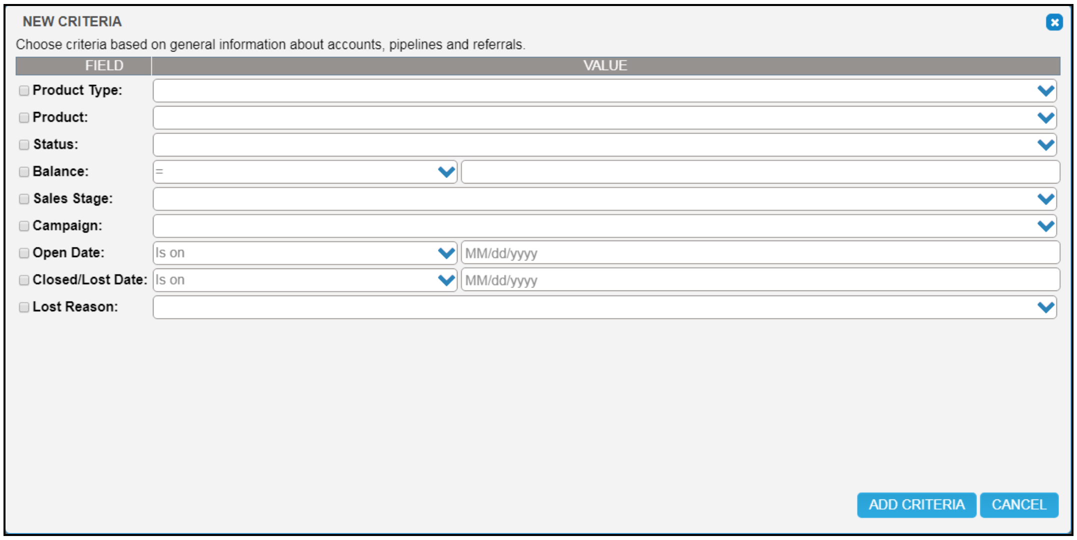


Activity list Criterion

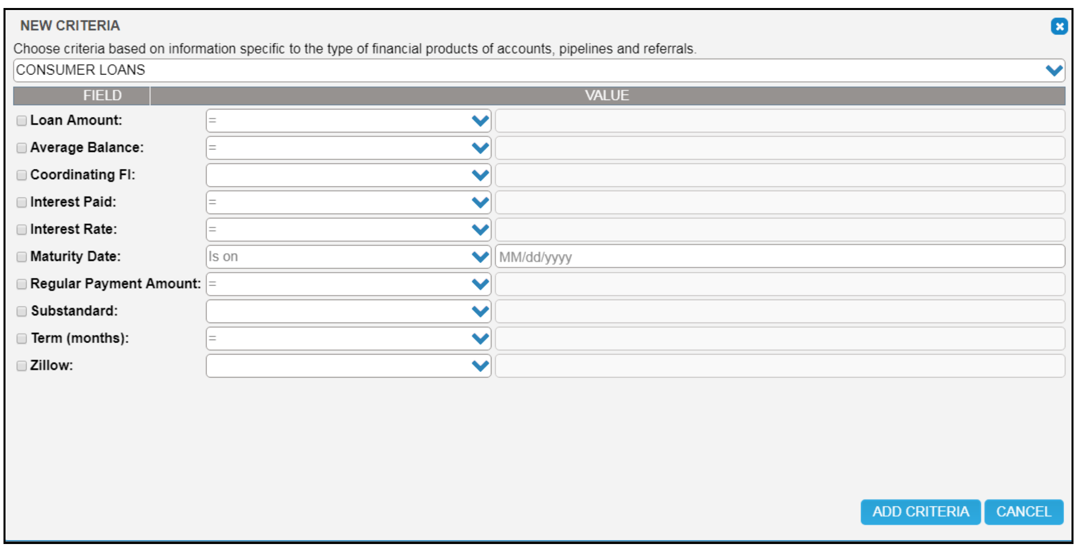
The following image shows the criteria group in **Activity List**.



- **General Info** - will filter based on the fields from the account page.

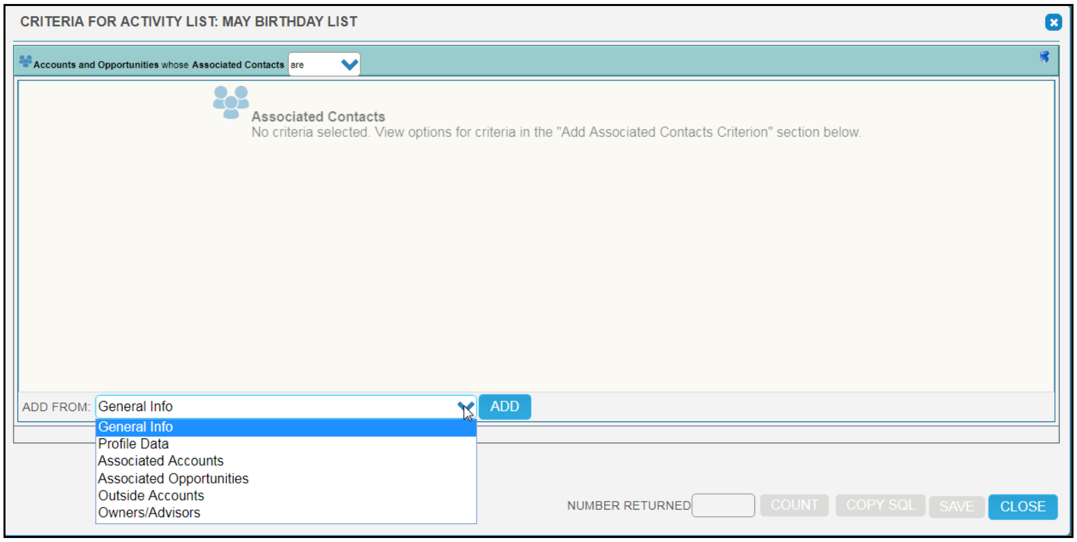


- **Product Type-Specific Details** – will filter based on product type details. These details are specific to each product type and are determined by what fields are sent from your Core/Host system (some fields may look different than the example we have provided).

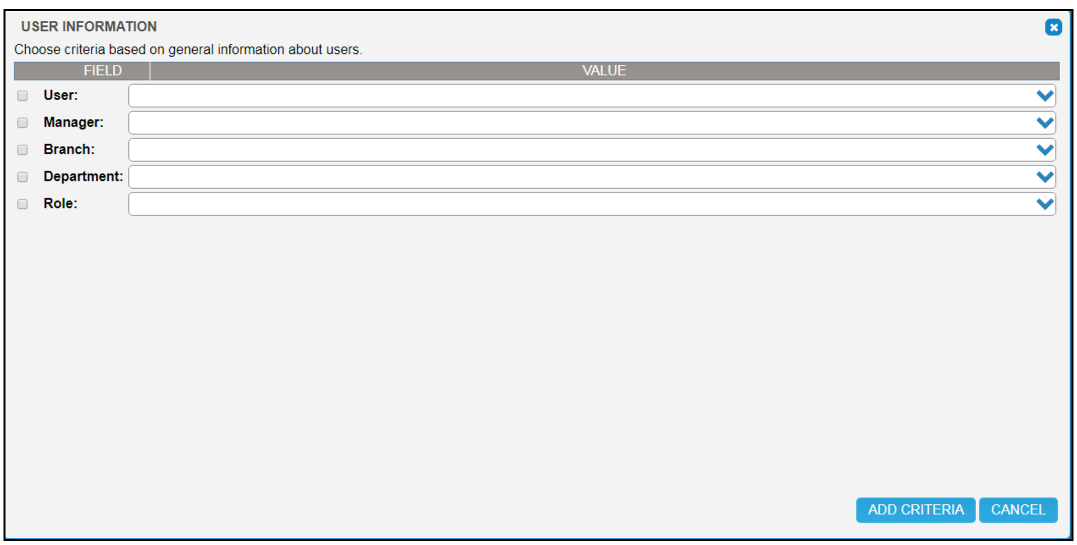


- **Associated Contacts** – will filter based on contacts that are associated to the accounts or opportunities by allowing you to add **Contact List** based filters.

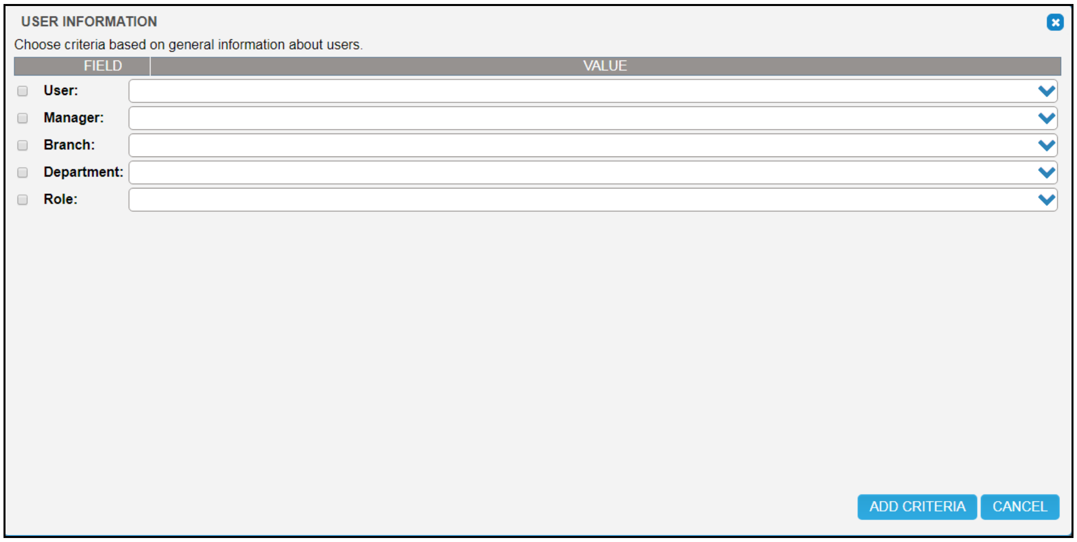
Note: As you add **Contact List**-based filters to an **Activity Type** list, you will see a string build at the top of the **Contact List**/ **Activity List** page. You can make edits to this string using the drop downs that appear as well as remove any addition by selecting the blue "X" at the top right of the page.



- **Owners** – will filter based on all activities that are owned (opened by) certain employees.



- **Referrers** – will filter based on all activities that are referred by certain employees.



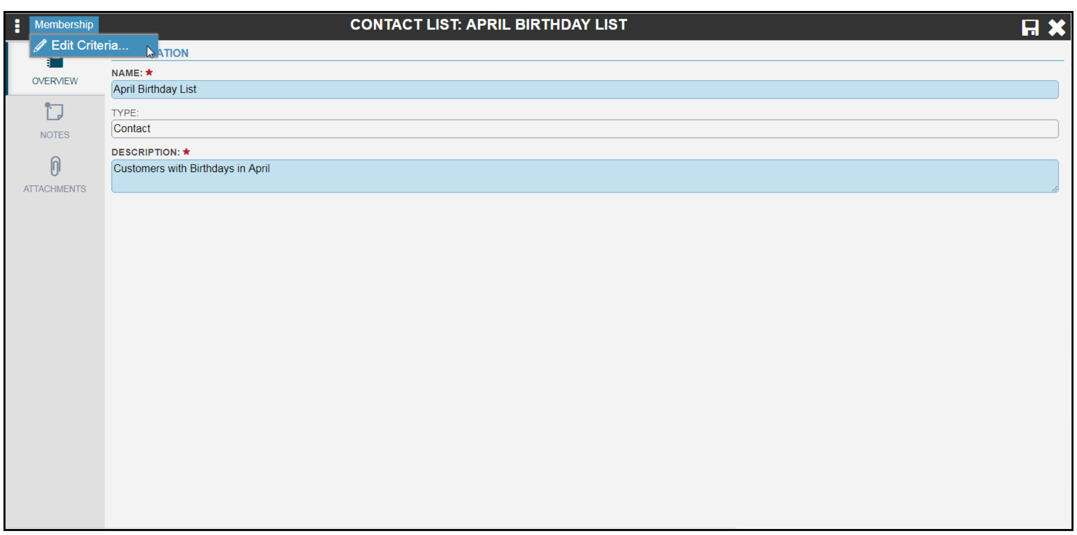
Note: The Marketing Manager will only create lists based on the primary account holder information.

Adding filter criteria to new marketing list

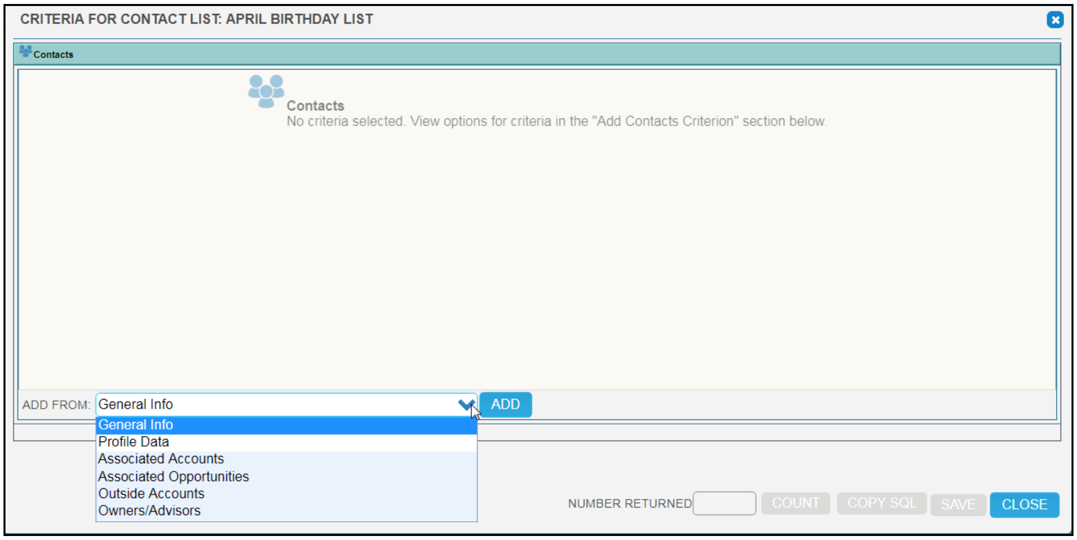
This section provides the information on adding filter criteria to new marketing list.

To add filter criteria

1. Create a new marketing list using the procedure given in the section Creating a new marketing list.
2. In the new marketing list, hover over the **Membership** menu option at the top left of the page and click **Edit Criteria**.

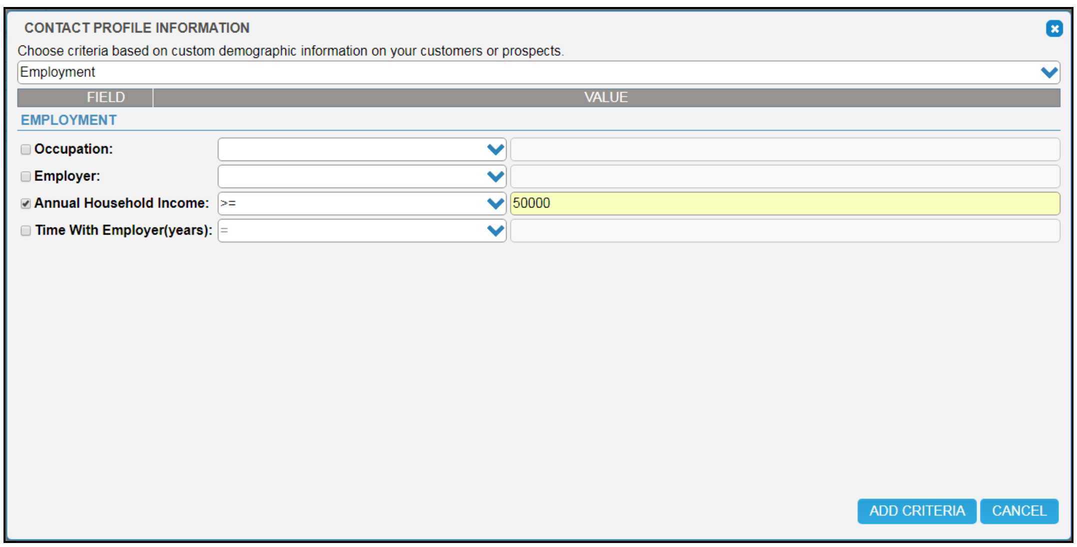


The **Criteria for Contact List/ Criteria for Activity List** page is displayed, allowing you to add the criteria for your list.



3. Select the criteria group and click **Add** .

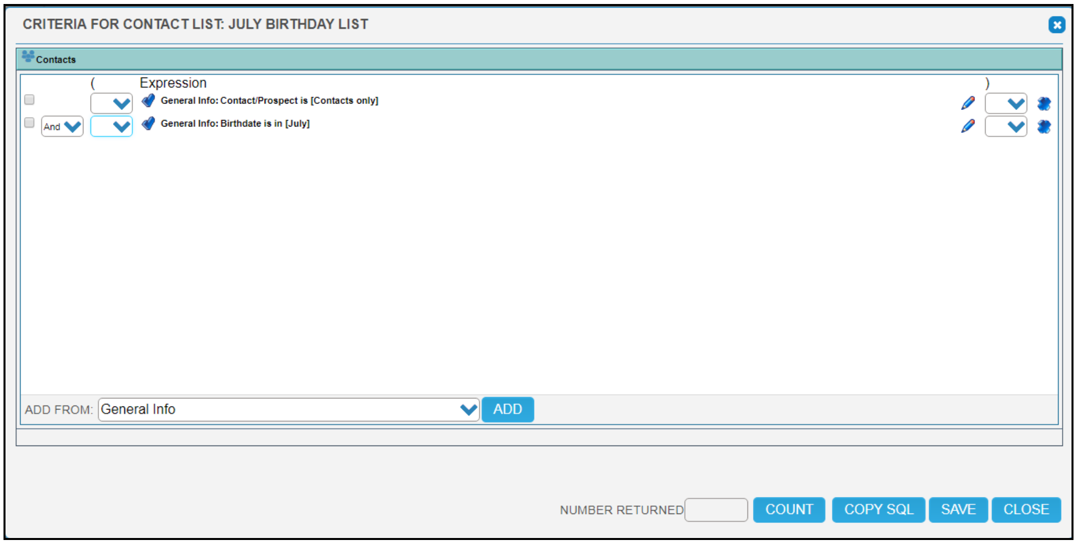
   A new page is displayed with the field options for the criteria group you selected.



4. Select the fields you would like to filter on and define your criteria for the list. Click **Add Criteria** .

Note: Additional filters can be applied by repeating this step.

Now you will see all of the filters you have added on the Criteria for **Contact List/Activity List** page. From this page, you can select the blue "X" to the right of each filter to remove any filter that you do not want.

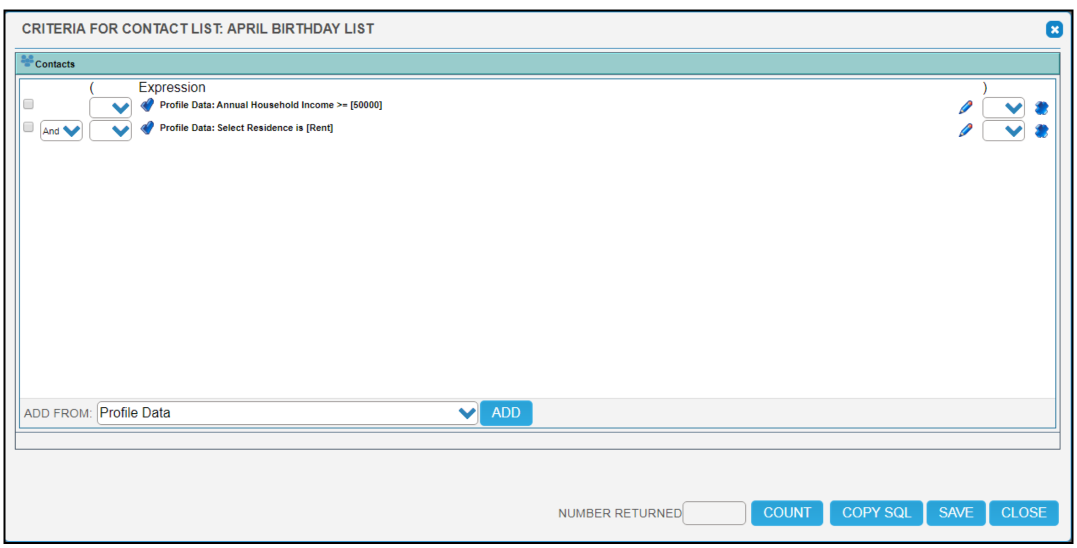


5. Click **Save** once you have added and verified your filters.

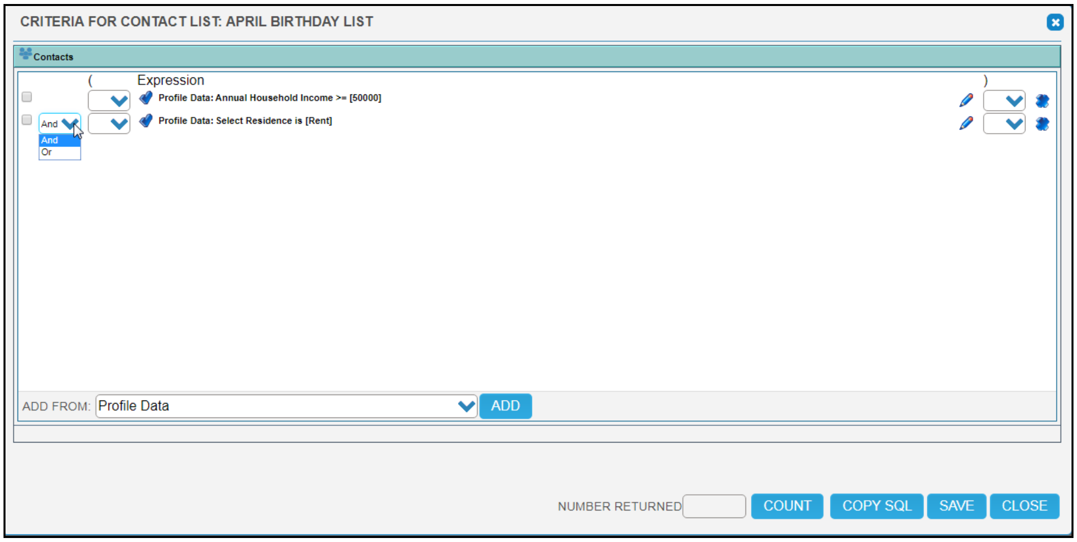
Note: If you would like to see the number of contacts returned from the filters you have applied, click **Count**. Click **Close** to close the Criteria for **Contact List/Activity List** page.

Using And and Or conjunctions

You may also group certain filters by selecting the (And) in the drop downs on either side of the filter.



And and **Or** conjunctions can be found in the drop down to the left of the filter. These will fall between each filter and will help you set your criteria correctly.



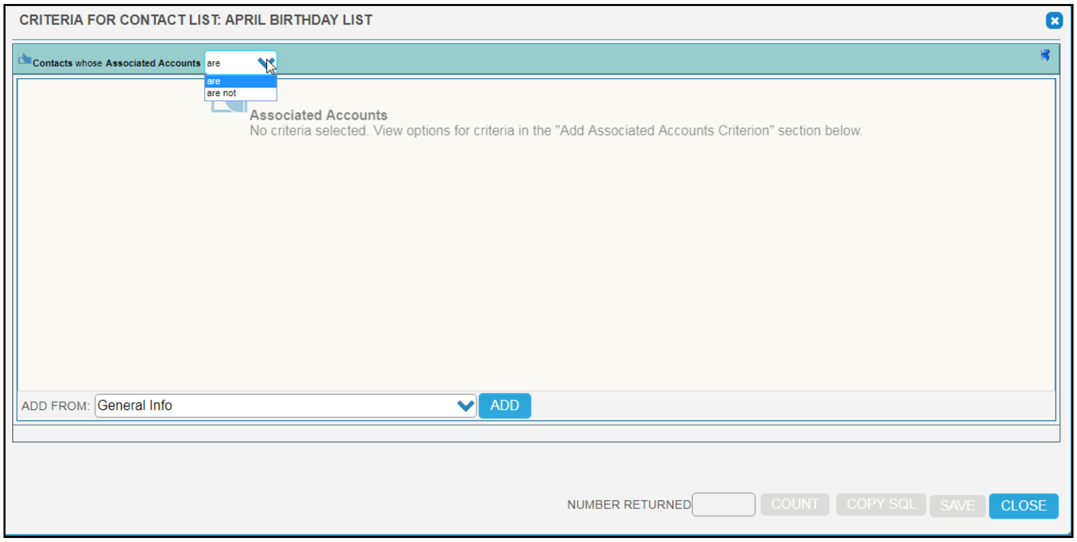
Examples:

a. Find all contacts that have a Checking account “Or” Savings account.

b. Find all contacts that have a checking account with a balance of >= $5000 “And” have a Savings account with a balance of > $10,000.

Note: Within either type of marketing list a user has the ability to “associate” information. In a Contact list you can identify the “associated” accounts and/or opportunities. In an Activity list you can identify the “associated” contact records. Associated information is controlled by a dropdown that includes an “are” and “are not” option. Please see examples below of statements using these options and the information that will be defined:

Using are and are not



Contact List:

- **Example 1:** Contacts whose Associated Accounts “are” DDA.

  Definition 1: This will identify contact records that have DDA accounts.

- **Example 2:** Contacts whose Associated Accounts “are not” SAVINGS

  Definition 2: This will identify contacts records that do not have Savings accounts.

Activity List:

- **Example 1:** Accounts and Opportunities whose Associated Contacts “are/is” Zip Code = 78759.

  Definition 1: All associated contacts records to the accounts and/or opportunities where the contact lives in zip code 78759.

  If you begin with an Activity list and want to see contacts that do not own DDA accounts your statement would look like the one below. To create this list you would select Associated Contacts “are” and then Associated Accounts “are not”:

- **Example 2:** Accounts and Opportunities “that have” Associated Contacts whose Associated Accounts “are not” DDA.

  Definition 2: This will define that of the accounts and opportunities identified, select the contacts who do not own a DDA account.

Below is an example of a common, yet more complex contact marketing list and the filters required to create this list:

Target List: Identify all contacts that are of a retail type who own a DDA account and do not own a SAVINGS or LOAN or TIME product. With this type of list in mind you will want to break this down into three different segments.

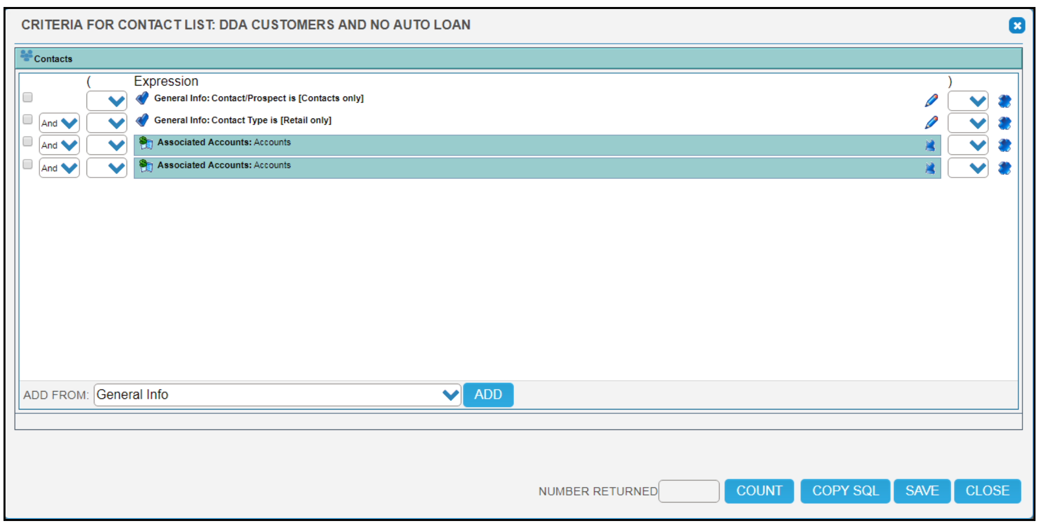
a. Contacts – Customers that are retail.

b. Accounts – Customers who OWN a DDA type account.

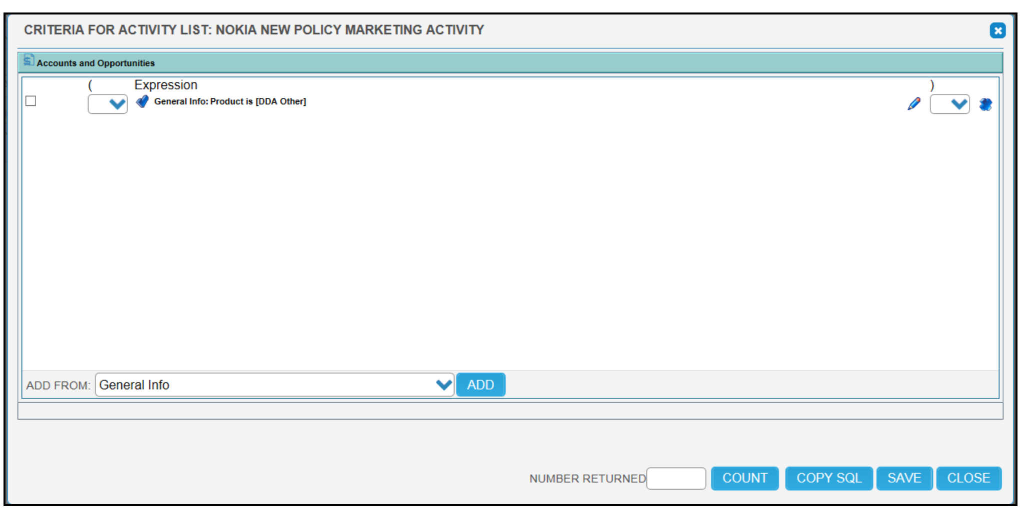
c. Accounts – Customers who DO NOT own a SAV, LOAN, or TIME account.

The screen shots below depict the overview screen of the filter criteria and how they are broken into the three segments. By selecting the blue arrows on each row of "Associated Accounts" criteria we can review the filters required to produce the list.

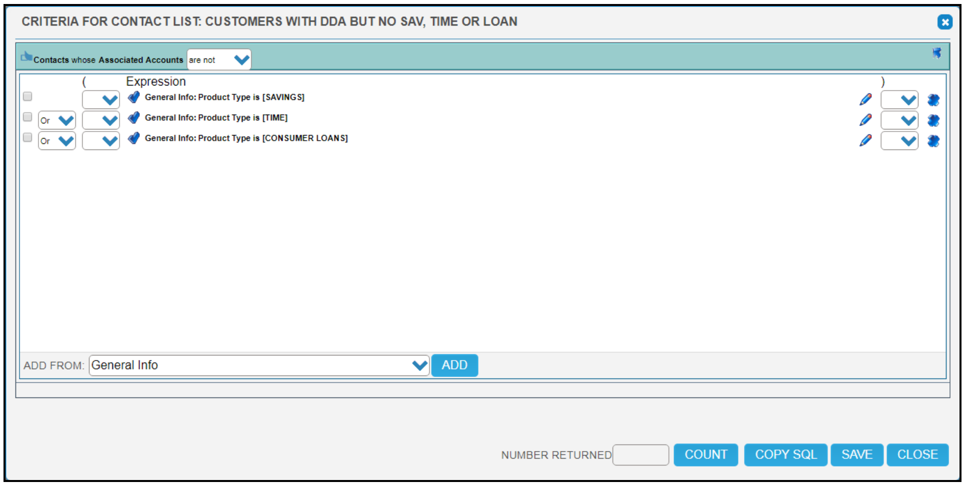
- **Contacts – Customers that are Retail**



- **Customers own a DDA type account**



- **Customers DO NOT own a SAVINGS, TIME, or LOAN account**



Note: Use of the **are not** and **Or** conjunction in this set of filters. Use **are not** to include criteria describing an account, opportunity, or other associated object that a contact you want to retrieve DOES NOT HAVE. By using the **Or** conjunction in the example above, you are indicating that you want to find contacts that have no account that is EITHER Savings, “Or” Loans, “Or” Time. Having any of these three types of accounts would disqualify the contact from this list.

Note: You would not use the **And** conjunction to find contacts with none of these types of accounts. Be careful with the use of **And** statements to make sure that you do not create impossible criteria. If you structured your list to find “Contacts whose Associated Accounts ‘are’ Product Type is Savings ‘And’ Product Type is Loans ‘And’ Product Type is Time”, your list would return no contacts, because no account can be a Savings account and a Loan account and a Time account at the same time. Conversely and for the same reason, if you structured your list to find “Contacts whose Associated Accounts ‘are not’ Product Type is Savings ‘And’ Product Type is Loans ‘And’ Product Type is Time”, your list would return all the contacts in ResourceOne.

Using is and is not

Marketing filters include additional options of **is** and **is not**. When creating filters the default value will be **is**. For example, in a contact list if you add associated accounts that are of a DDA product type the filter will read “Product Type ‘is’ DDA.” This filter will produce a list of contacts that have (or do not have) associated accounts of a DDA.

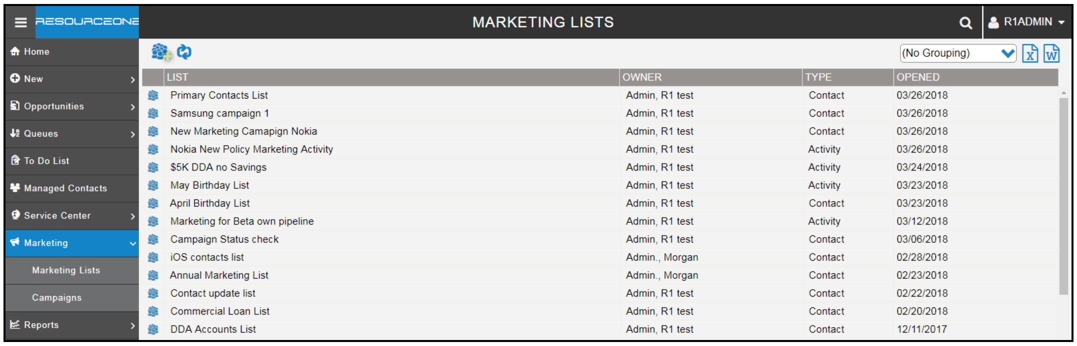
The alternative is to use the **is not** option. If a filter is added using this option the results could change dramatically. For example, using the same example above, if a user identifies an associated account that **is not** a DDA, this list would then identify contacts who own an account that is not a DDA’s.

Editing a marketing list

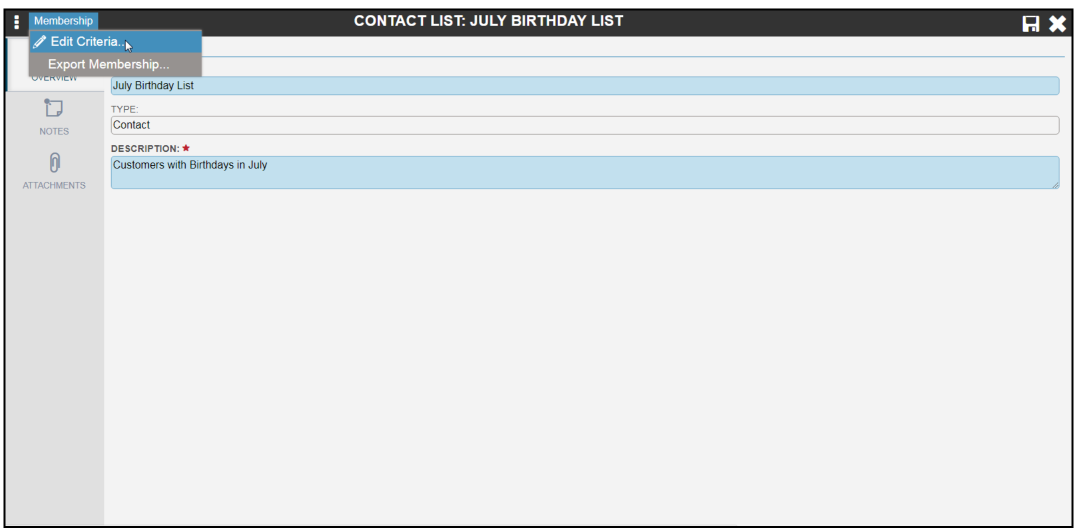
This section provides the information on editing marketing list.

To edit a marketing list

1. Go to **Marketing** > **Marketing Lists**. The **Marketing Lists** page is displayed.



2. Click the required marketing list icon () to edit the marketing list. The **Contact List**/**Activity List** page is displayed.

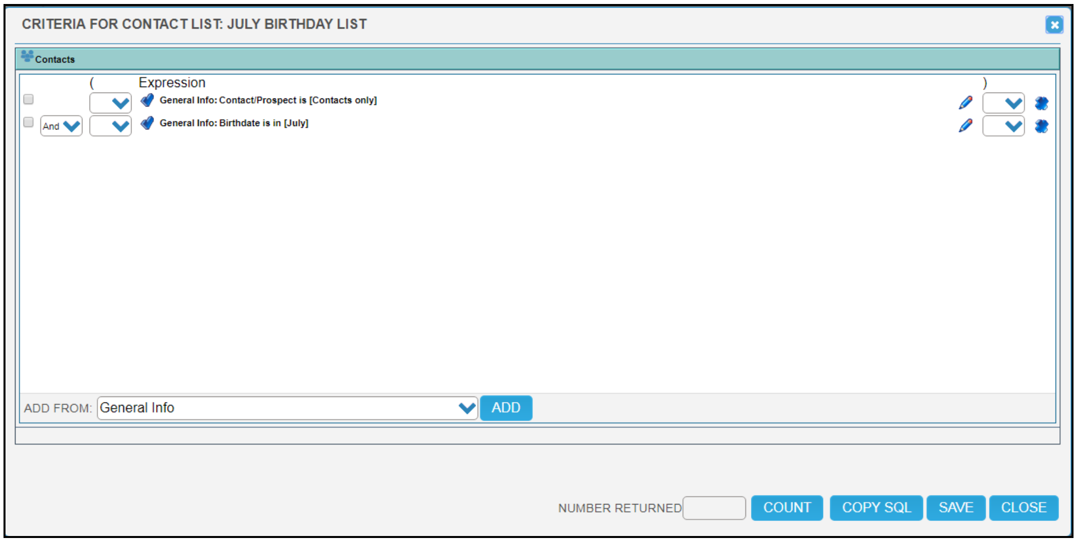


3. Edit the **Name** or **Description** of the list.

> **Note:** The list type is locked once originally saved. If you need to change the type you will need to create a new list.

4. Hover over the **Membership** menu option at the top of the page and select **Edit Criteria** . The **Criteria for Contact List**/ **Criteria for Activity List** page is displayed.

5. In that page, you can remove, add, or re-group any filter that you like.



6. Click **Save**.

Marketing Lists - Take Action: What can you do with it?

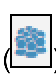
Now that you have created a marketing list you can:

- Generate reports for viewing or mail merge marketing. Report types come in Excel (.xls), Word (.doc), Comma Separated Values (.csv), or Adobe Acrobat (.pdf).
- Create a marketing campaign to distribute pipelines or events for employees to call on the contacts from your list.
- Present products for employees to recommend to contacts based on the criteria that has been defined in your marketing list.

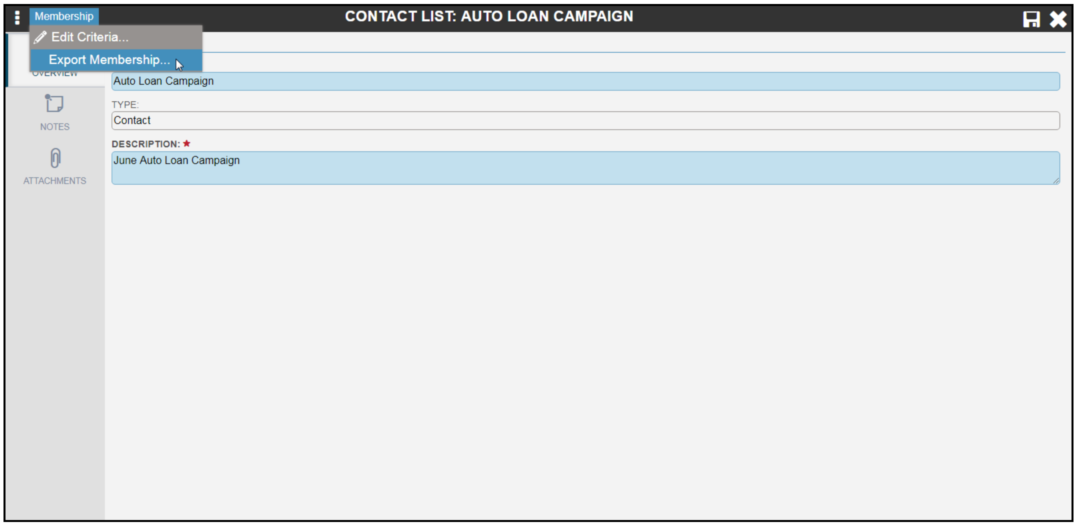
Generating a report from a marketing list

This section provides the information on generating report from marketing list.

To generate a report

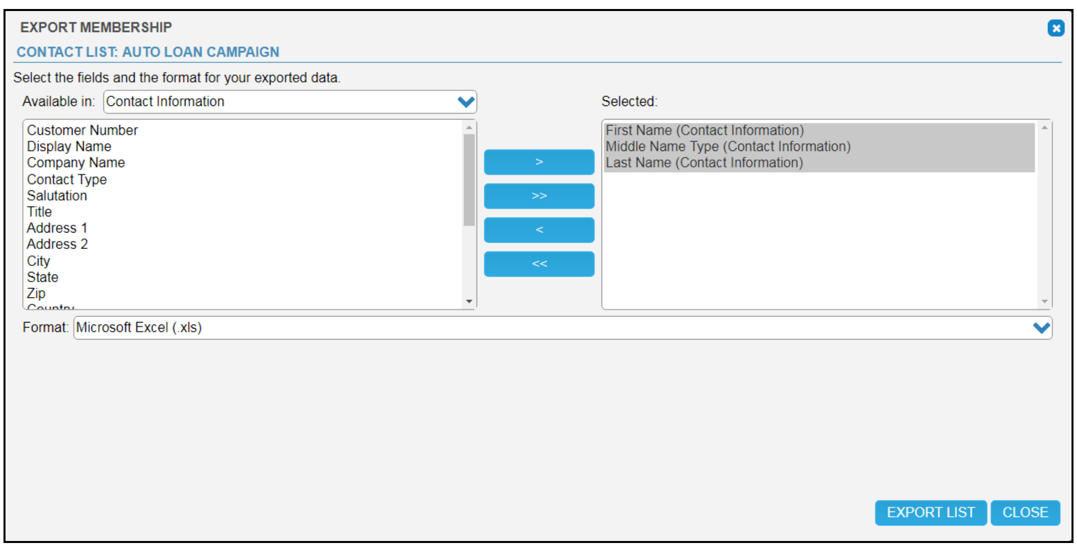
1. Go to **Marketing** > **Marketing Lists**. The **Marketing Lists** page is displayed.
2. Click the required marketing list icon () for which you wish to generate report. The **Contact/Activity** List page is displayed.

3. Hover over the **Membership** menu option and click **Export Membership** . The **Export Membership** page is displayed

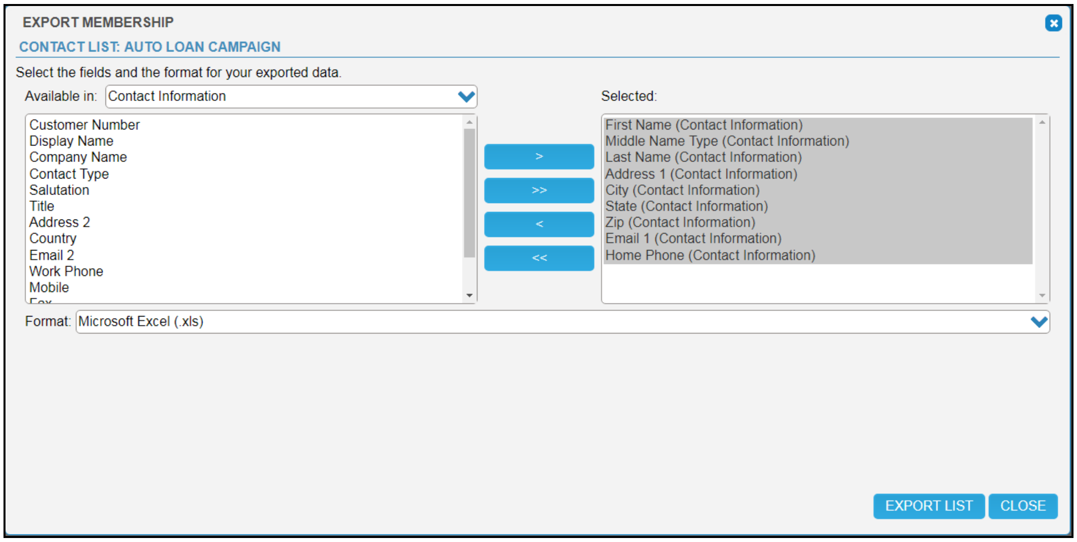


4. Select the fields that you would like to see in the report and then click the right arrow button **>** to move the field to the **Selected:** box.

> **Note:** You can highlight multiple fields by using the mouse or by holding down the control (CTRL) button on your keyboard and then clicking on each field with your mouse. You can also change the field options to report on based on the **Available in**: dropdown above the left-hand box.



5. Select the **Format** of the report you would like to export .



6. Click **Export List** . The report gets generated

7. You can **Open**, **Save** or **Cancel** the report.

3

Creating a marketing campaign

Creating a Marketing Campaign

Marketing Campaigns is located in **Marketing > Campaigns**.

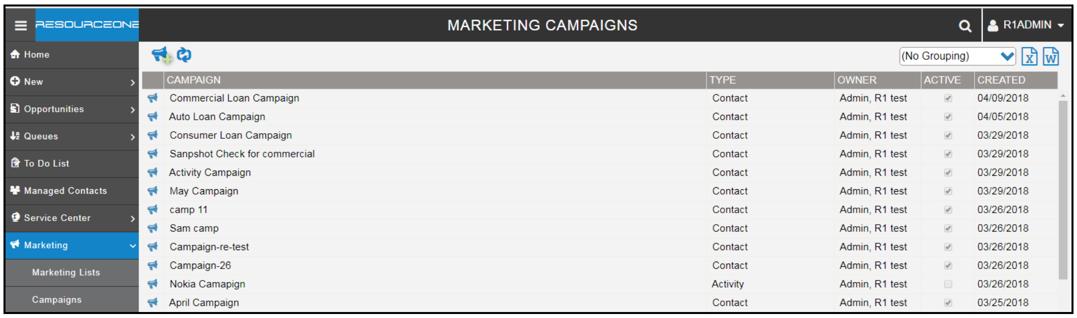
The Campaigns page displays all campaigns that have been created and details for those campaigns.

Creating a new campaign

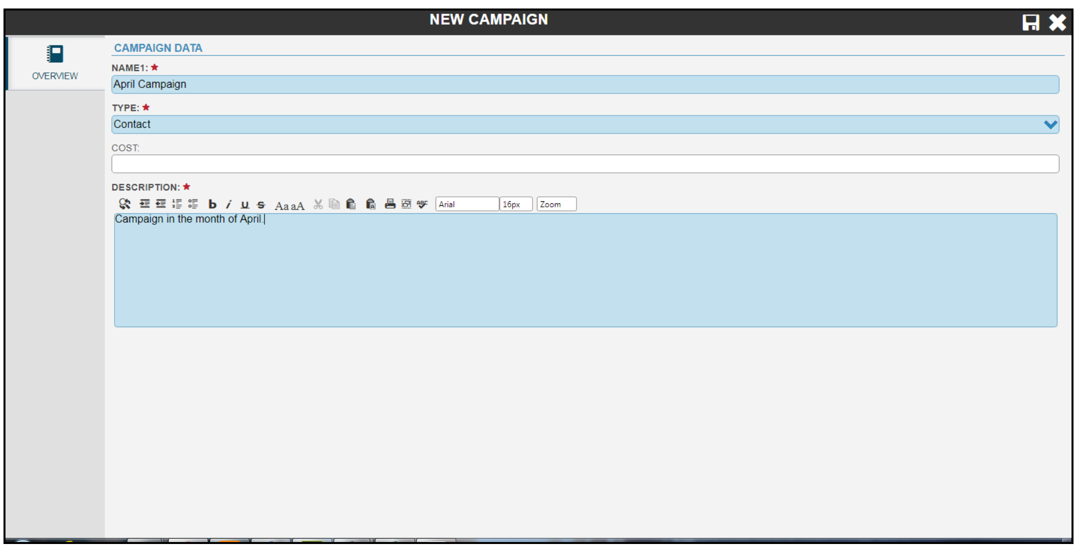
This section provides the information on creating a new campaign.

To create a new campaign

1. Go to **Marketing** > **Campaigns**. The **Marketing Campaigns** page is displayed.



2. Click the button. The **New Campaign** page is displayed.

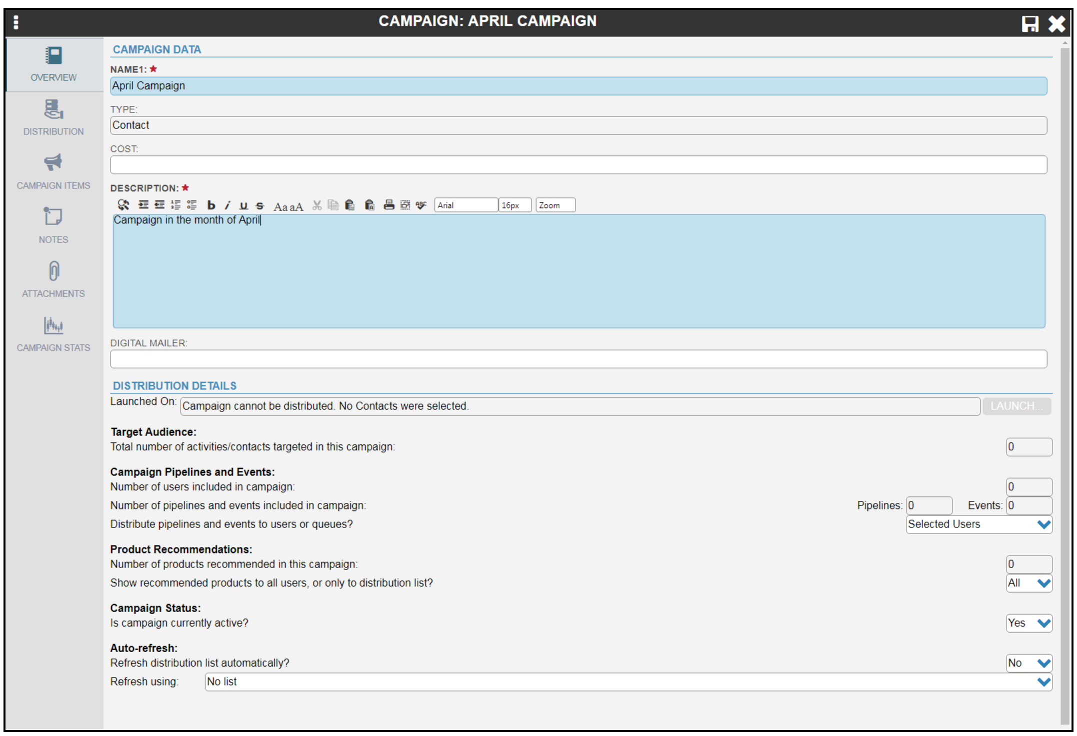


3. Enter the following information:

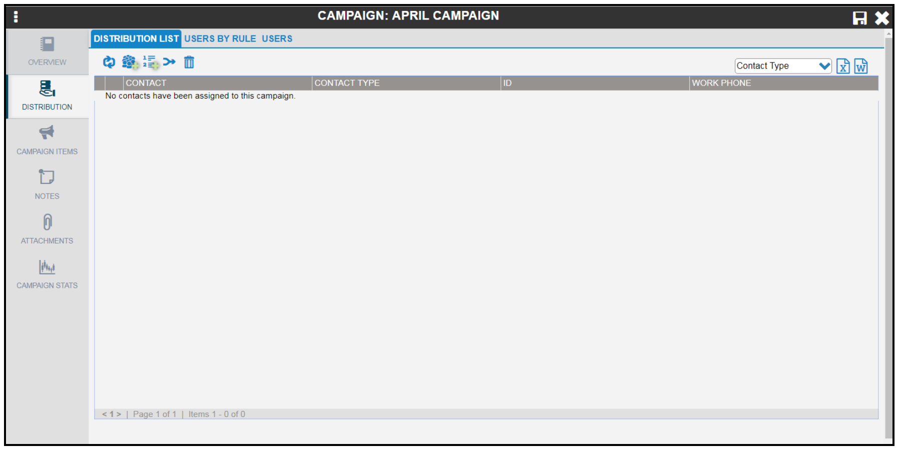
    - Enter the campaign **Name**.
    - Select the **Type** of campaign: **Contact**, **Activity**.
    - In **Cost**, enter how much the campaign cost. This is an optional field and will only display in the Campaign Summary report.
    - Enter a **Description** of the campaign.

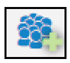
4. Click the  button to save. Once saved, you will see additional options to complete the campaign for recommending products.

    The **Overview** page displays the name and the description of the campaign you have created. The **Distribution Details** section will also allows you to launch the campaign once the distribution methods and campaign items have been completed. This page also displays the number of users included in the campaign, pipelines, events, whether to distribute to users or queues, the number of products recommended in this campaign, and whether or not to refresh this marketing campaign automatically (you can select a Daily, Weekly, Monthly option and the specific list tied to the campaign).

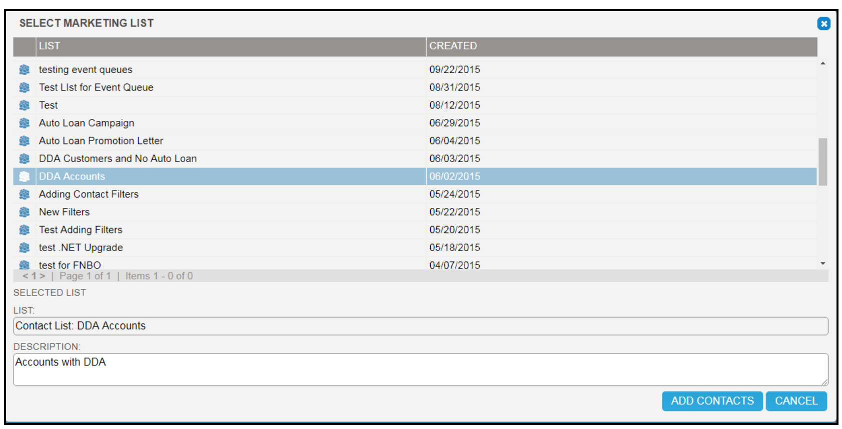


5. Click the **Distribution** tab to add a marketing list or run an advanced exported report.



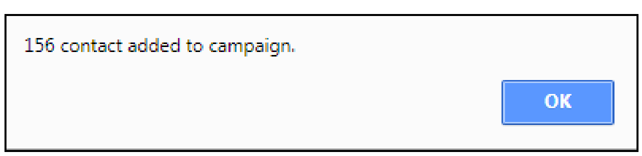
6. Click the  button to import a list that you have created from the marketing lists tool. The **Select Marketing List** page is displayed.

Note: A Contact Type campaign will allow you to select Contact Lists and an Activity Type campaign will allow you to select Activity Lists.



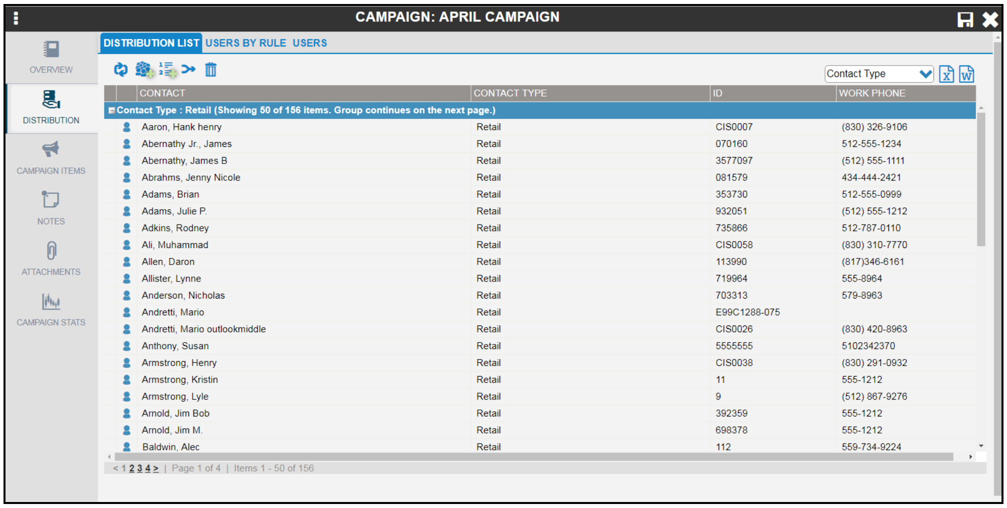
7. Select the marketing lists and click **Add Contacts** .

A dialogue box will identify how many contacts have been imported into the campaign.



Note: Your number may differ slightly for two different reasons. Contacts that have Opted Out will not be included in the campaign and duplicate occurrences of contacts will also be removed.

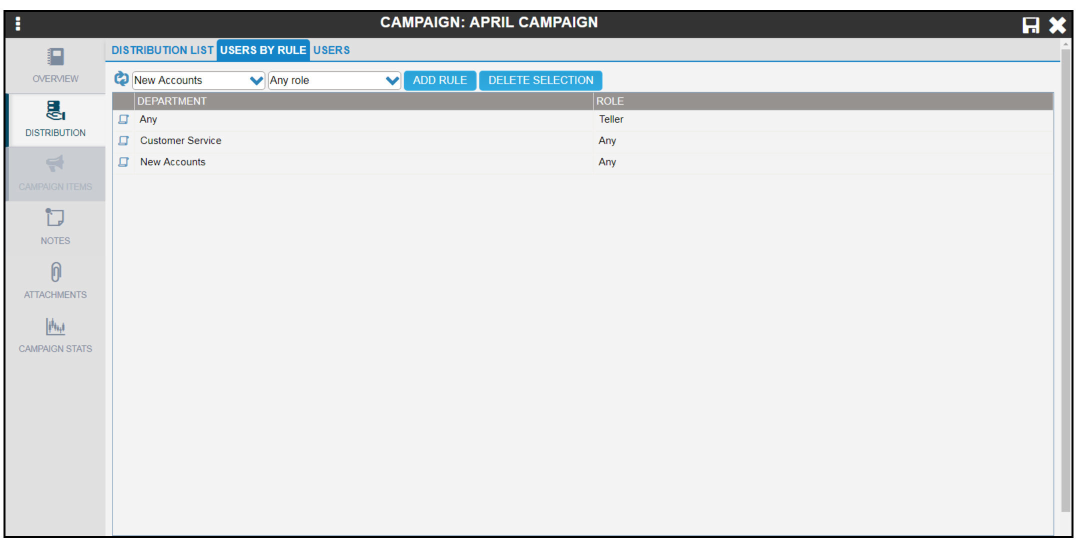
Once the contacts have been selected, you will see a list of contacts that have been selected for this campaign.



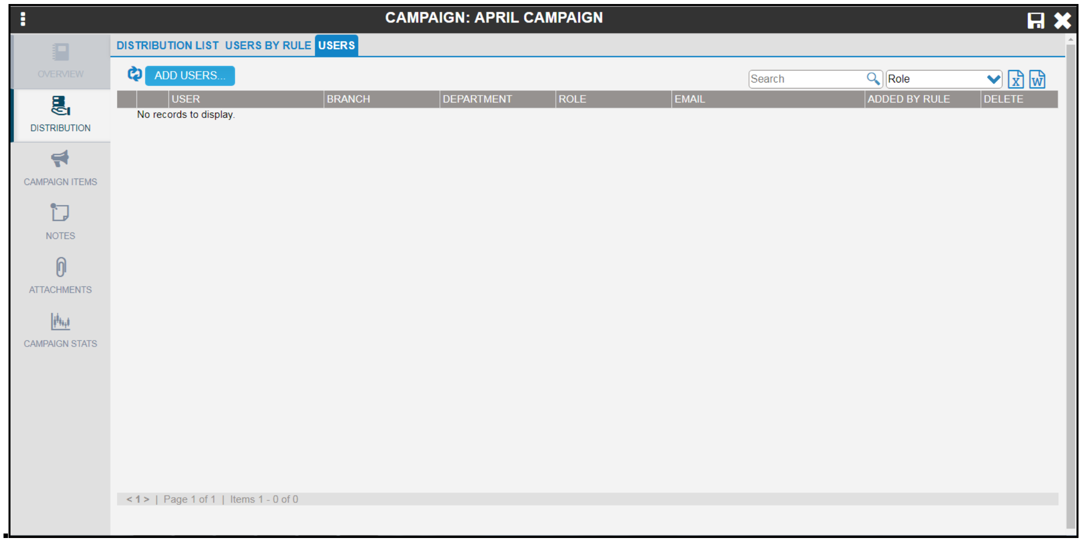
8. Click the **Users by Rule** tab to add the users to the campaign.

9. Select the **Department** or **Role** from the dropdown and click **Add Rule**. Multiple rules can be added to include different users.

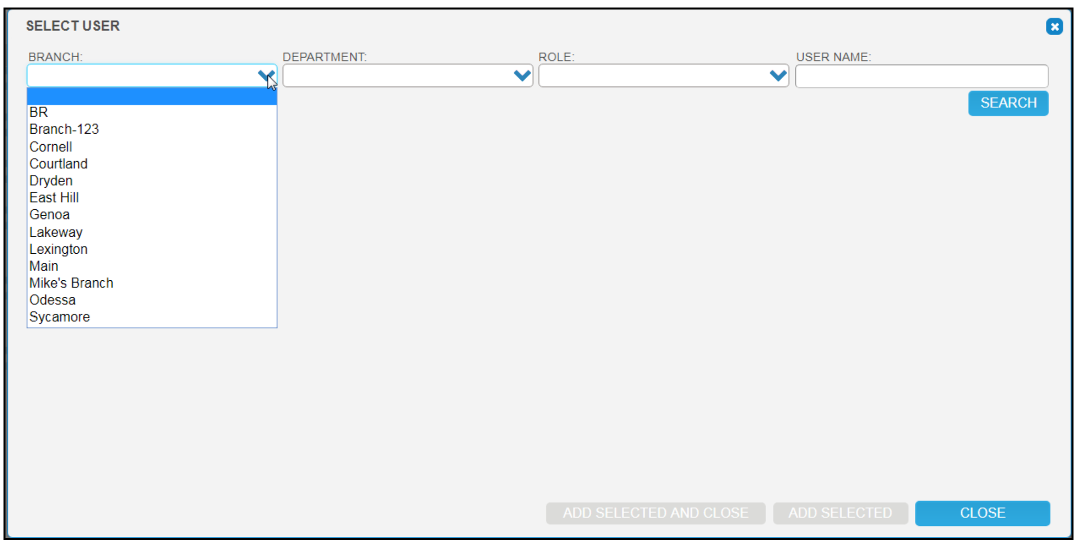
Note: When using snapshot recommendations, if a rule for the “Teller Role” is added, then access to view recommendations for a campaign are automatically granted to new tellers that are hired.



10. Click the **Users** tab to add users directly.

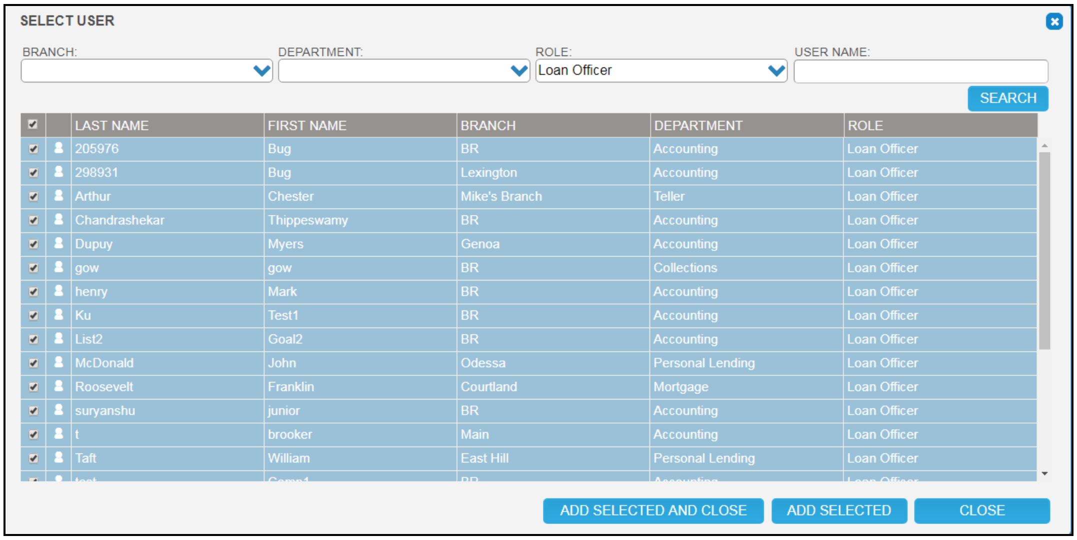


11. Click **Add Users** . The **Select User** page is displayed.



12. Search the users through **Branch**/**Department**/**Role**/**User Name**.

13. Select the users from the result list and click **Add Selected** .



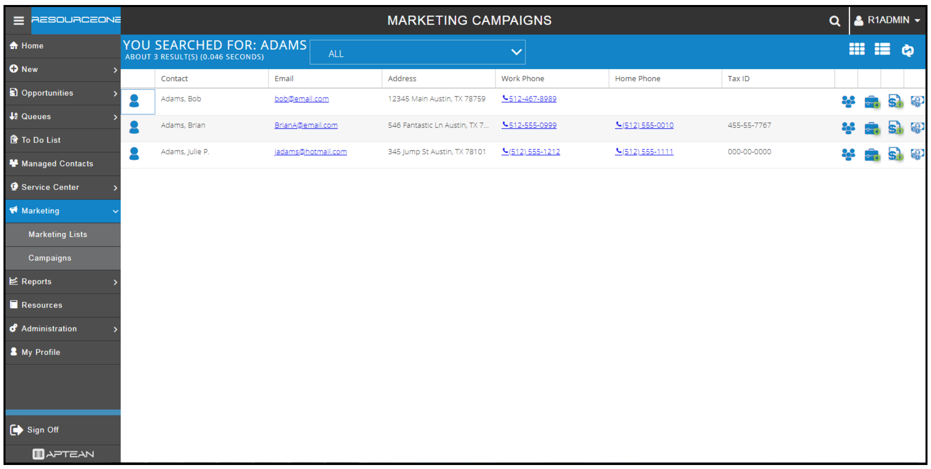
Note: Select the **Add Selected and Close** button if you wish to close this page after selecting the users.

14. Click the  button to save.

Campaign Items

Now that the contacts and users have been selected for the campaign, you can either:

- Create Pipelines and/or Events to distribute to the users you have selected.
- You can also add Product Recommendations to be displayed for employees either via the ResourceOne pop-up or the users doing a contact search and selecting the Recommend products icon at the top of the Search Contacts page.

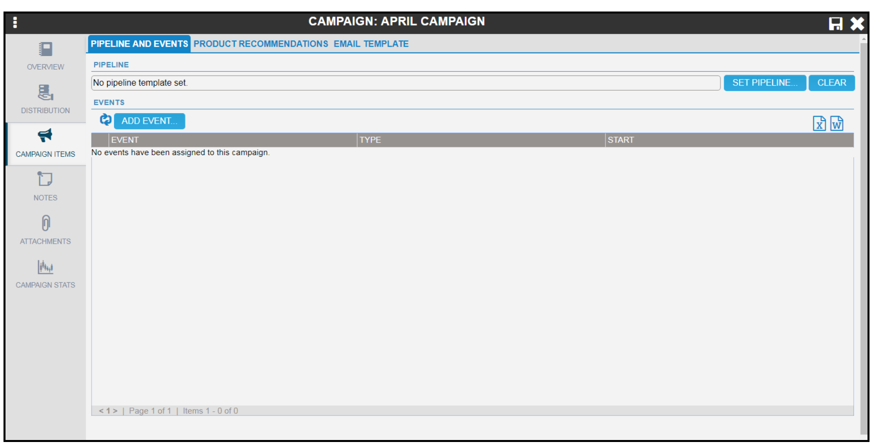


Creating Pipelines

This section provides the information on creating pipelines.

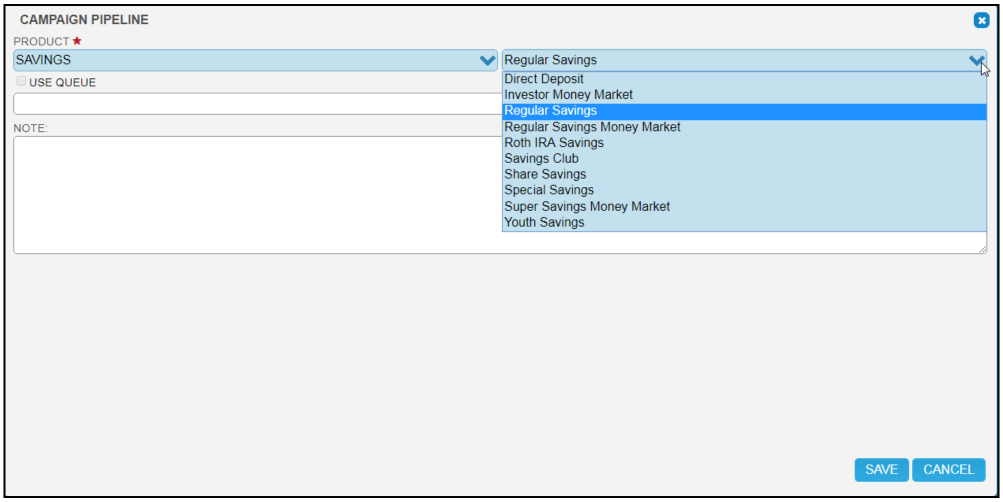
To create pipelines

1. Go to **Marketing** > **Campaigns**. The **Marketing Campaigns** page is displayed.
2. Click the required campaign icon ( ) to add pipeline.The **Campaign** page is displayed.
3. Click the **Campaign Items** tab. The **Pipeline and Events** page is displayed.



4. Click **Set Pipeline**.The **Campaign Pipeline** page is displayed.

Note: By creating a pipeline template you will auto generate opportunities for your selected users. The opportunities will appear on their pipeline list.

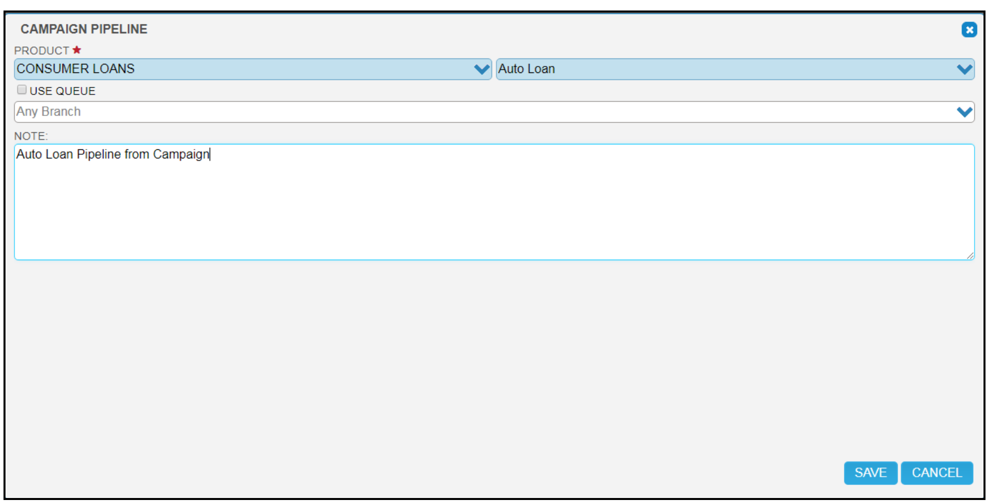


5. Select the **Product Type** and **Product** that you would like to create the pipeline for.

6. Select the **Use Queue** checkbox and the branch that you would like to distribute these pipelines to or leave the checkbox unselected to distribute to the users you have already selected .

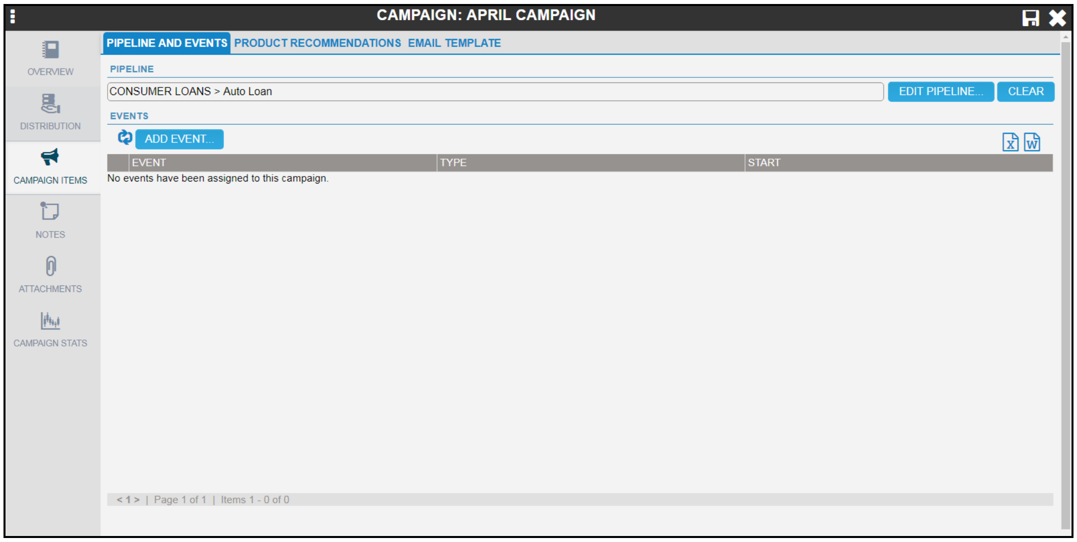
Note: To use the queue functionality your institution must have active referral queues created.

7. Enter a **Note** to the pipeline to indicate any other specific information relevant to this opportunity.



8. Click **Save**. The pipeline will be saved and you will now see the pipeline product type and product added to the **Campaign Items** page.

> **Note:** If you need to edit the pipeline,click **Edit Pipeline** or just clear out the pipeline by clicking **Clear**.

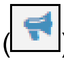


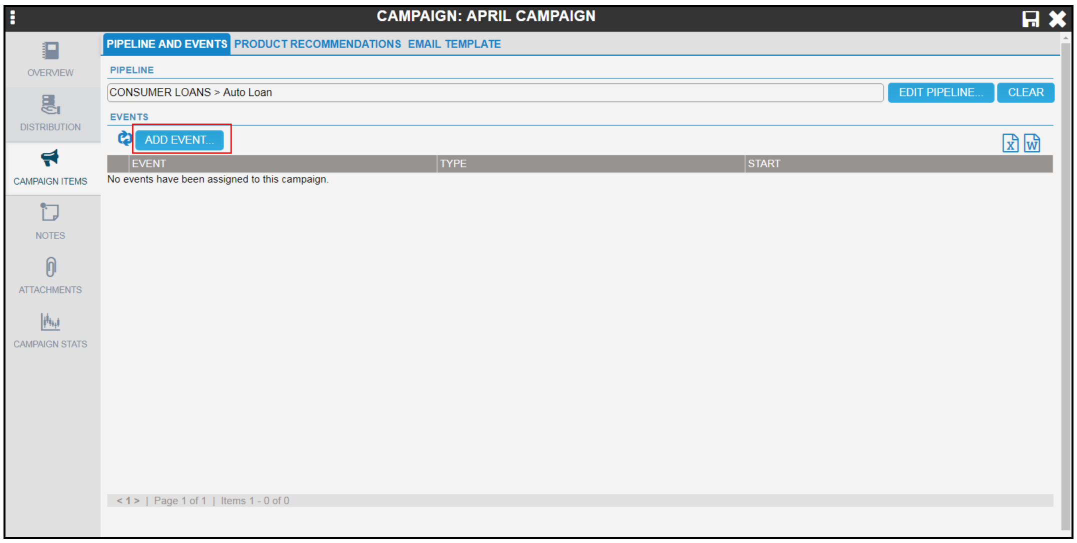
> **Note:** The opportunities that exist on a user’s pipeline list will be referred by the name of the marketing campaign. This will help identify where the opportunitiy originated from.

Creating events to the campaign

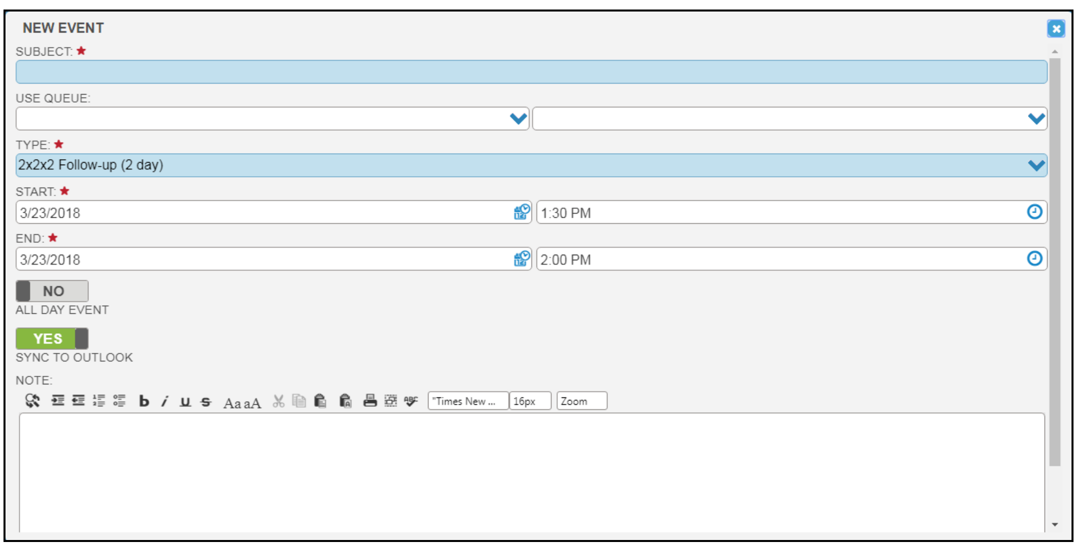
This section provides the information on adding events to campaign.

To add events

1. Go to **Marketing** > **Campaigns**. The **Marketing Campaigns** page is displayed.
2. Click the required campaign icon () to add event. The **Campaign** page is displayed.
3. Click the **Campaign Items** tab. The **Pipeline and Events** page is displayed.



4. Click **Add Event**. The **New Event** page is displayed.



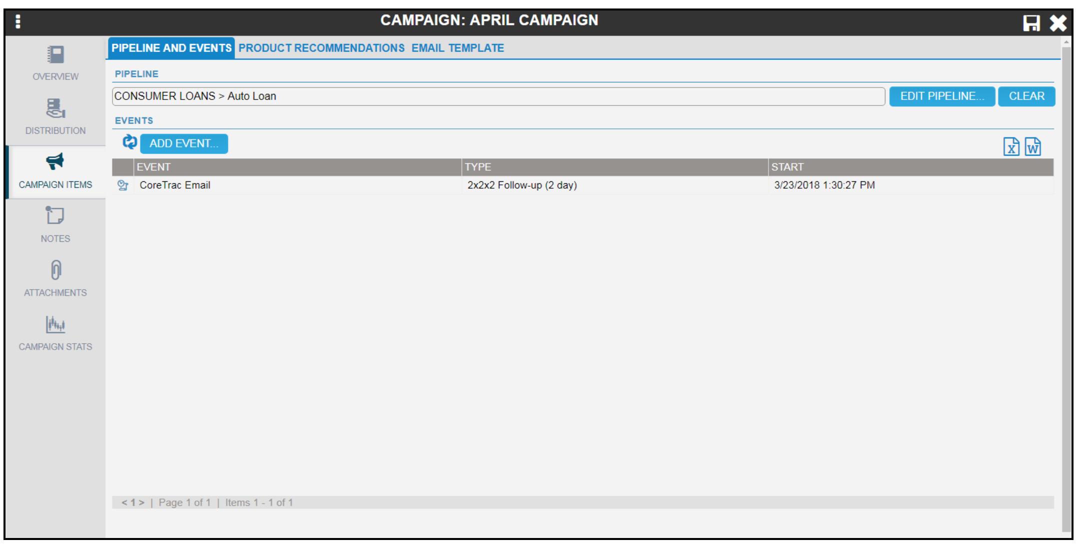
5. Enter the following information

   - Enter the **Subject** of the event
   - Select the **Type** of the event
   - Select the **User Queue**.
   - Select the branch.
   - Select the **Start** date and time of the event
   - Select the **End** date and time of the event.
   - Select **Yes** in **All Day Event** if the event is for one full day.
   - Select **Yes** to **Sync to Outlook** if notification has to be sent to user's outlook account.

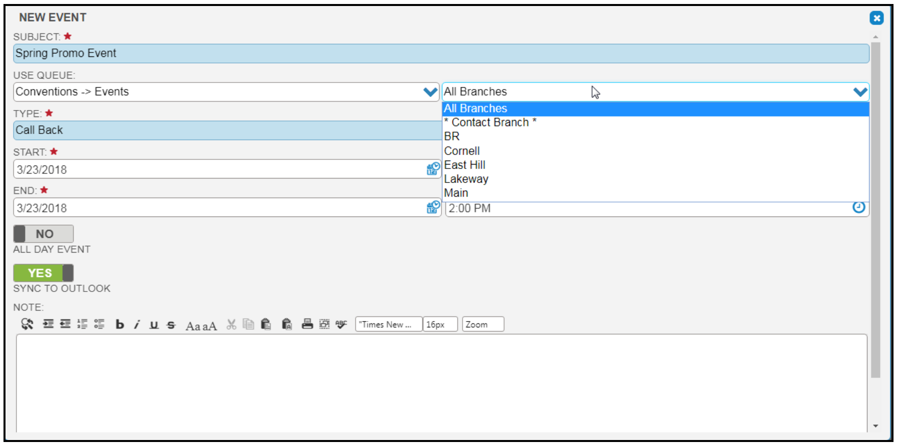
Note: In order for data to sync correctly to all recipients, each user must be assigned the **Sync to Outlook** permission via the **Administration** options.

6. Click **Save**.

   You will see the event populate in the **Campaign Items** page. If you would like to add additional events, repeat the above steps.



You can distribute the events to Queues if your institution has calling queues created. Calling queues are not tied to a specific product, but are given access to by Role and Department. You have several options to identify how you send these events to a queue. See the following image:



You can distribute these events to all branches or a specific branch or even to the **Contact Branch** or **Activity Branch** (contact branch appears in contact type campaigns and activity branch appears in an activity type campaigns). If you use either of these options you will distribute the event to the branch assigned to the contact or account (this data is required from your core system).

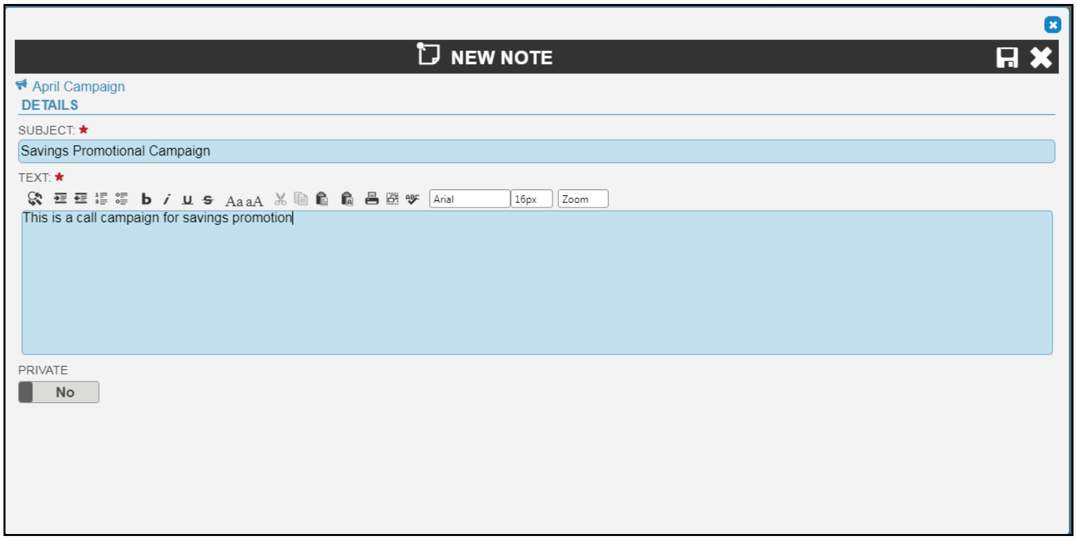
Adding Notes to the campaign

This section provides the information on adding notes to the campaign

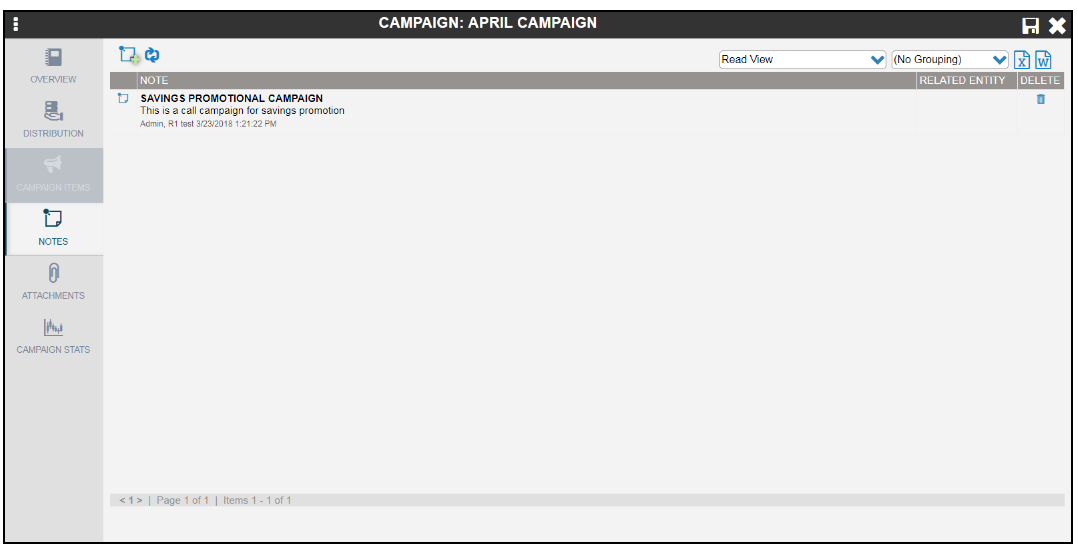
To add notes

1. Go to **Marketing** > **Campaigns**. The **Marketing Campaigns** page is displayed.
2. Click the required campaign icon ( ) to add event. The **Campaign** page is displayed.
3. Click the **Notes** tab. The following page is displayed.

4. Click the  button. The **New Note** page is displayed.



5. Enter the following information
   - Enter a **Subject** of the note
   - In **Text**, enter the contents of the note.
   - In **Private**, select **Yes** to display this note only to the owner.
6. Click the  button. Once saved, you will see the note added to the **Notes** page.

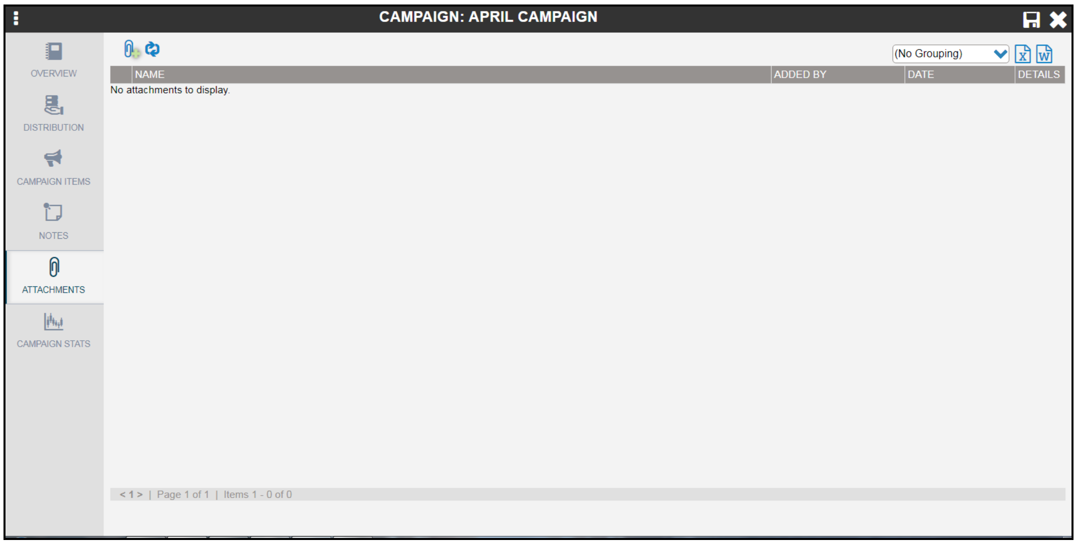


Adding attachments to the campaign

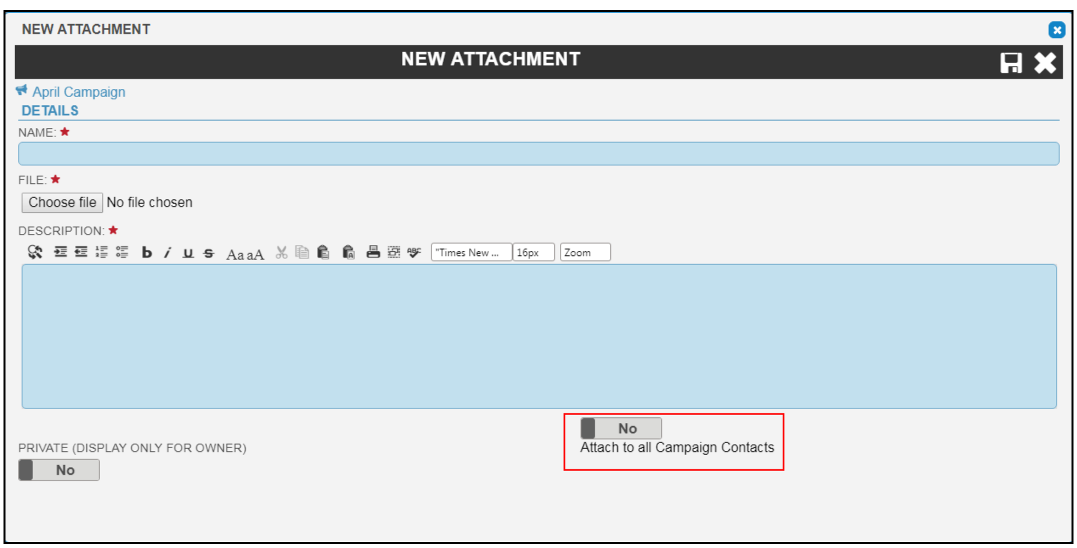
This section provides the information on adding attachments

To add attachment

1. Go to **Marketing** > **Campaigns**. The **Marketing Campaigns** page is displayed.
2. Click the required campaign icon ( ) to add event. The **Campaign**page is displayed.
3. Click the **Attachments** tab. The following page is displayed.



4. Click the button. The **New Attachment** page is displayed.



5. Enter the **Name** of the attachment.
6. Browse the file to be attached.

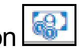
7. Enter a **Description** of the attachment.
8. In **Private**, select **Yes** to display this attachment only for the owner.
9. In **Attach to all Campaign Contacts**, select **Yes** to add this attachment to all campaign contacts.
10. Click the  button.

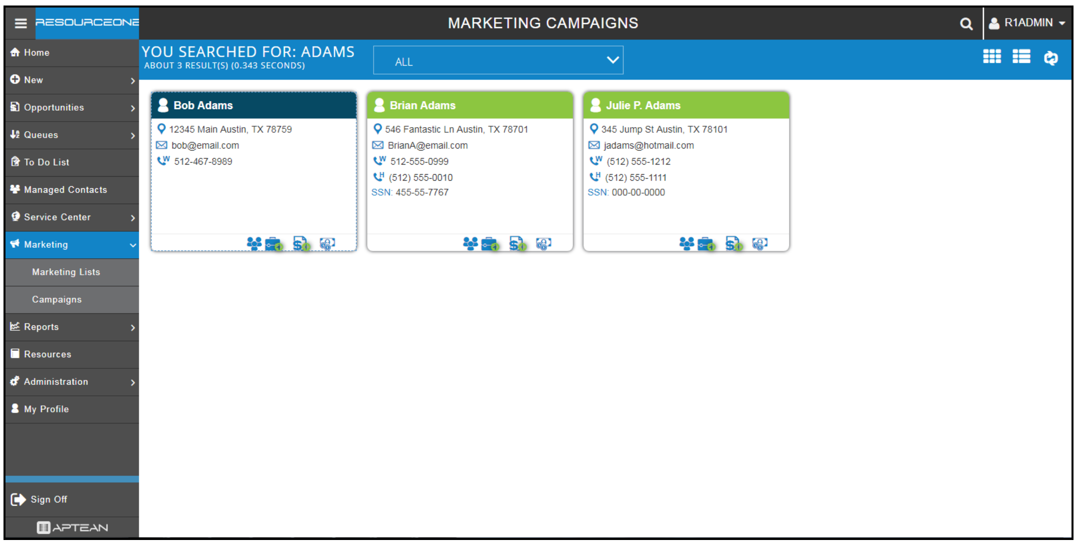
4

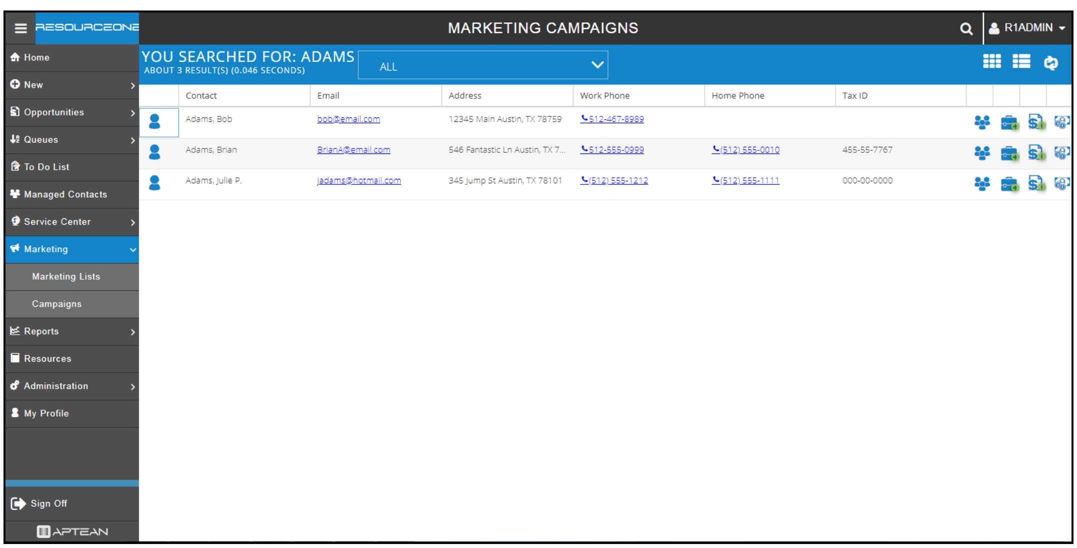
Recommend Products to Contacts

Recommend Products to Contacts

With the Marketing tools, users with the appropriate permissions will have the ability to use **Marketing Lists** to create filtered sets of contacts in which to recommend products. After the criterion is set for the filtered list, a user can create a **Marketing Campaign** to push out those recommended products to selected employees or all employees to view and recommend as the contacts visit your institution.

Product Recommendations can be displayed for all employees either by the ResourceOne pop-up or by doing a contact search and selecting the Recommend products icon  at the top of the Search Contacts page.



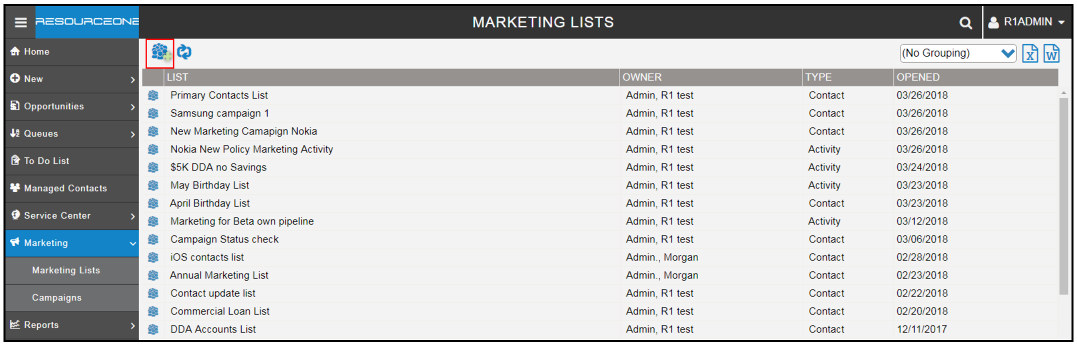


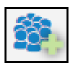
Creating a marketing list to recommend products

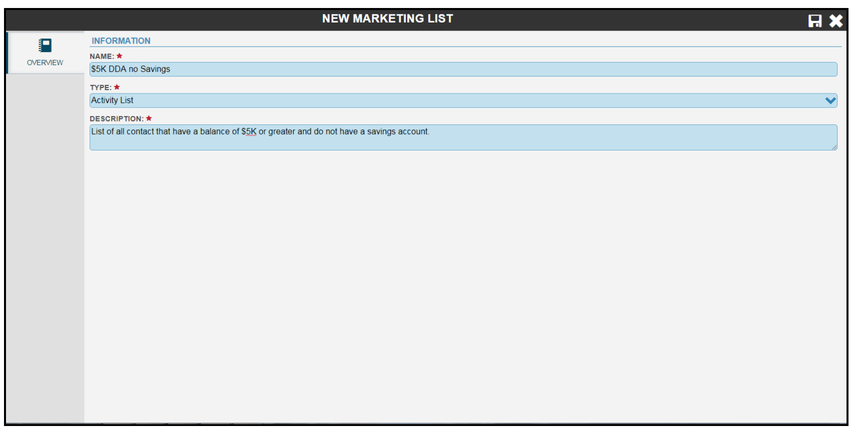
This section provides the information on creating marketing list to recommend products.

To create a marketing list

1. Go to **Marketing** > **Marketing Lists**. The **Marketing Lists** page is displayed.



2. Click the  button. The **New Marketing List** page is displayed.



3. Enter the following information
   - Enter the **Name** of the marketing list
   - Select the **Type** of list you would like to create: **Contact** or **Activity**.

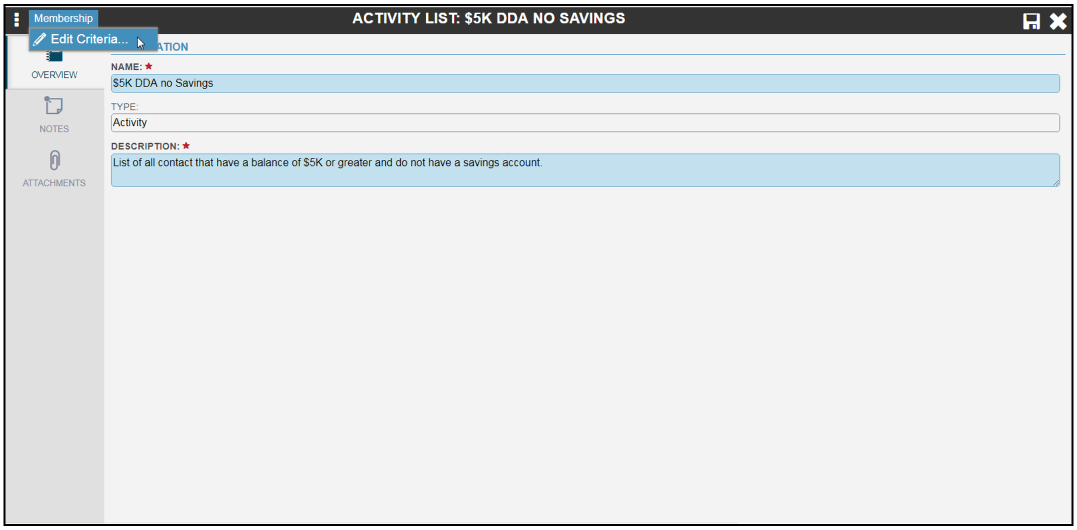
Note: The List type you select will determine what criteria filters will be available on the Edit Marketing List page. If you would like to recommend a product for contacts that have a Checking with a balance of greater than $5000, but no Savings account, you will want to select Activity.

   - Enter a **Description** for the marketing list.

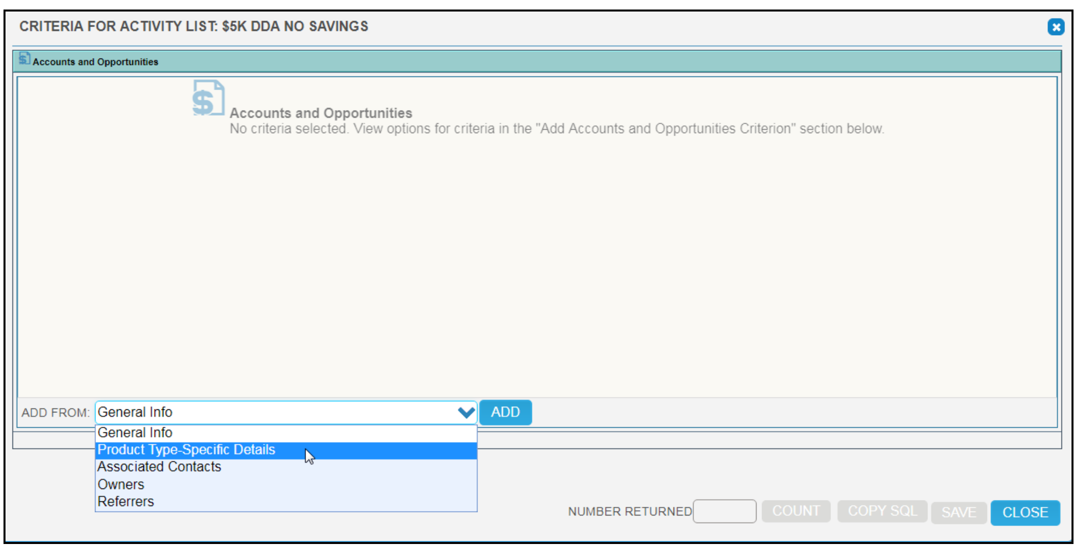
4. Click the button.

Note: For more detailed instruction on how to build a list and definitions of the list types, please see the Creating a new marketing list section of this guide.

5. Hover over the **Membership** menu option at the top left of the page and select **Edit Criteria**.



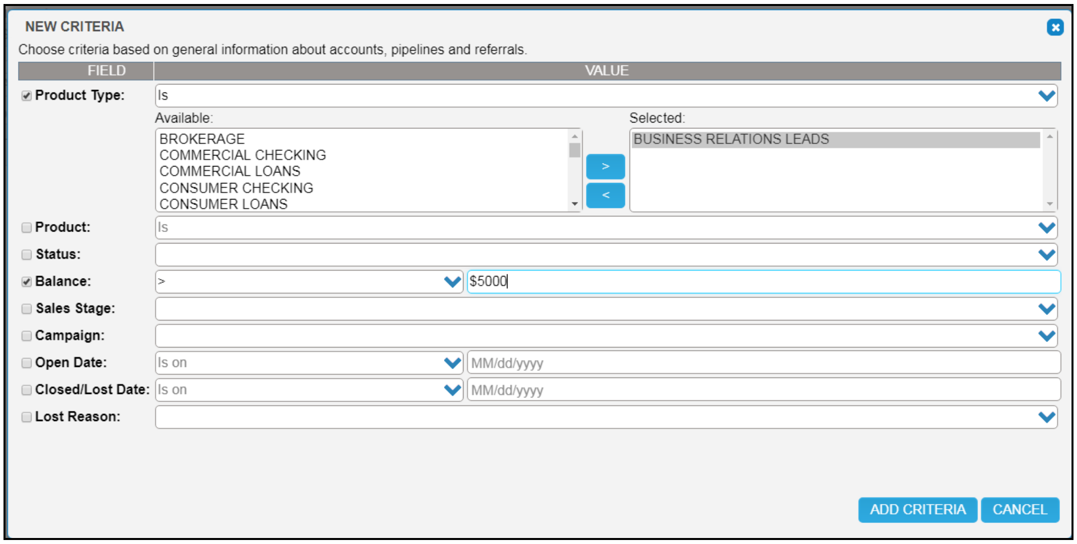
The **Criteria for Contact List/ Criteria for Activity List** page is displayed, allowing you to add the criteria for your list.



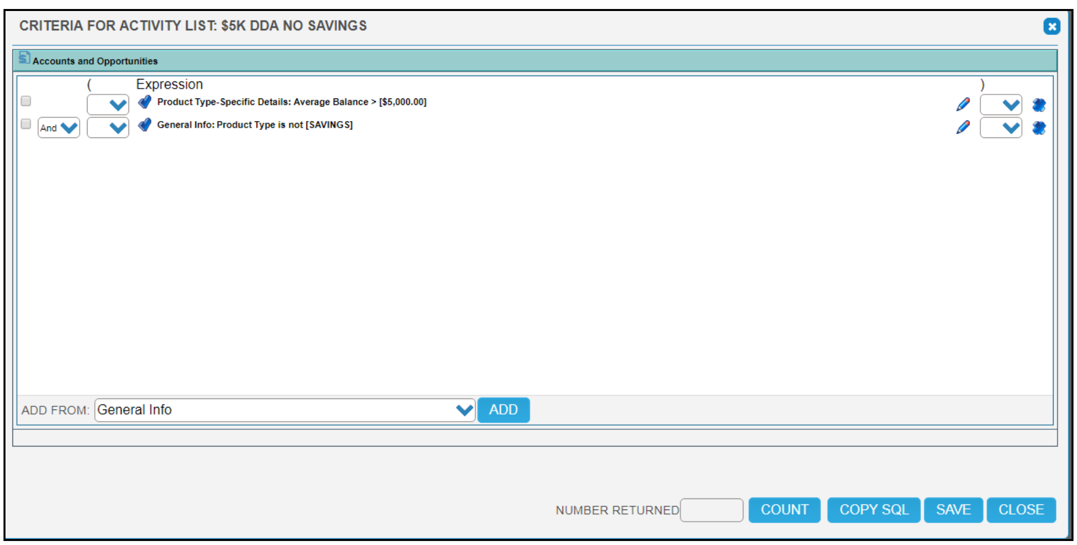
6. Click **Add** once you have selected the criteria

> **Note:** Definitions of the criteria groups can be found in the Marketing List portion of this document.

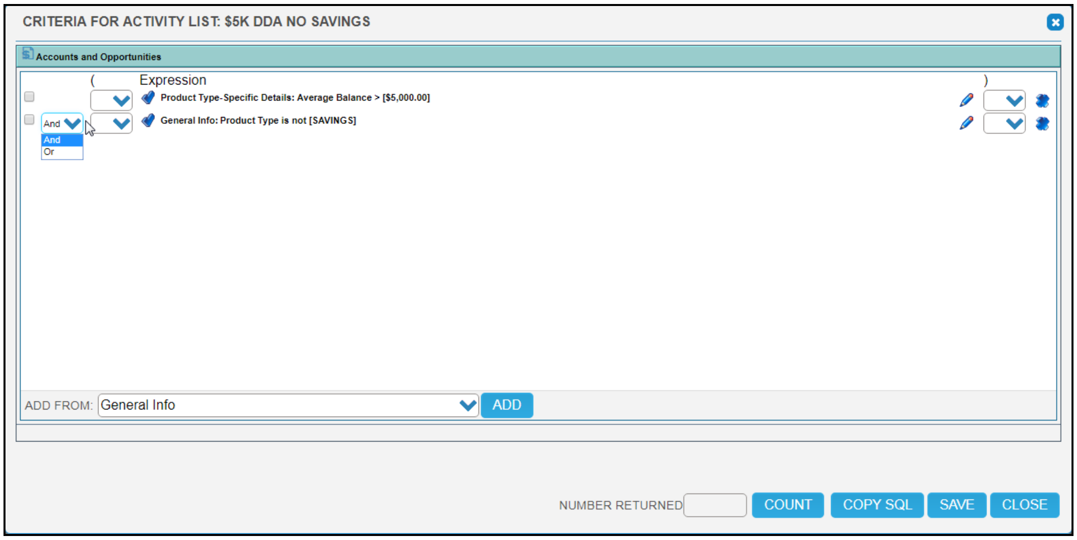
7. Select the fields you would like to filter on and define your criteria for the list. Click **Add Criteria**.



8. Once you have added your criteria, you will see all filters you have added. From this page, you can select the blue “X” to the right of each filter to remove any filter that you do not want.



You can/may also group certain filters by selecting the "(" and ")" in the drop downs on either side of the filter. **And** and **Or** drop downs will also fall between each filter to help you set your criteria correctly.



9. Click **Save** once you have added and verified your filters.

Examples:

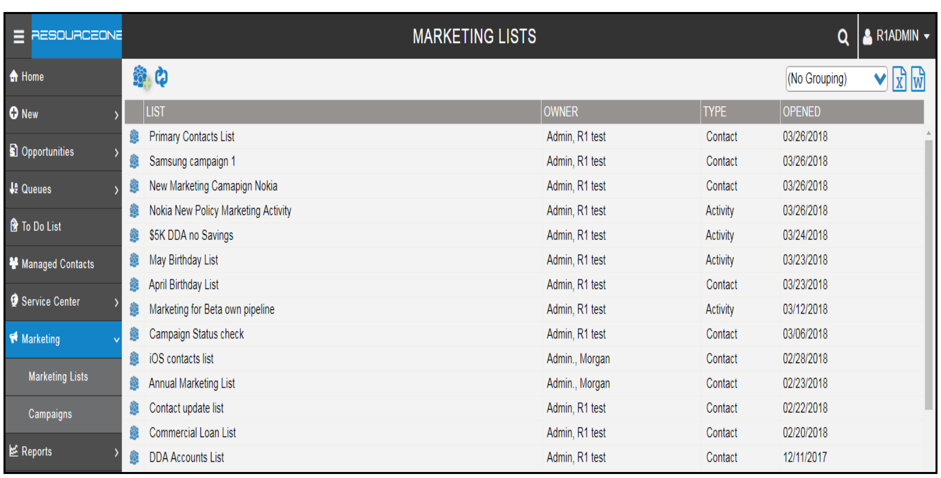
- Find all contacts that have a Checking account "Or" Savings account
- Find all contact that have a checking account with a balance of > $5,000 "And" have a Savings account with a balance of > $10,000.

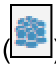
Editing a marketing list for the recommended products

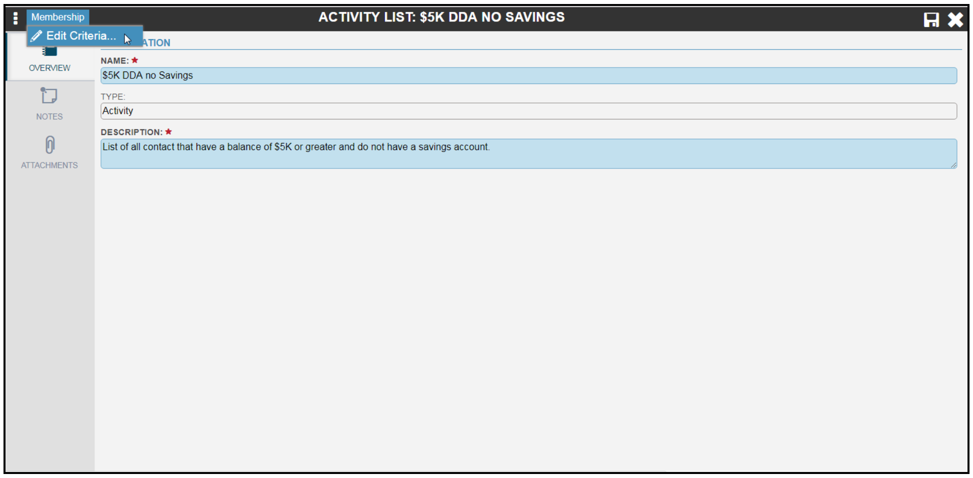
This section provides the information on editing marketing list.

To edit a marketing list

1. Go to **Marketing** > **Marketing Lists**. The **Marketing Lists** page is displayed.



2. Click the required marketing list icon () to edit the marketing list. The **Contact List**/**Activity List** page is displayed.

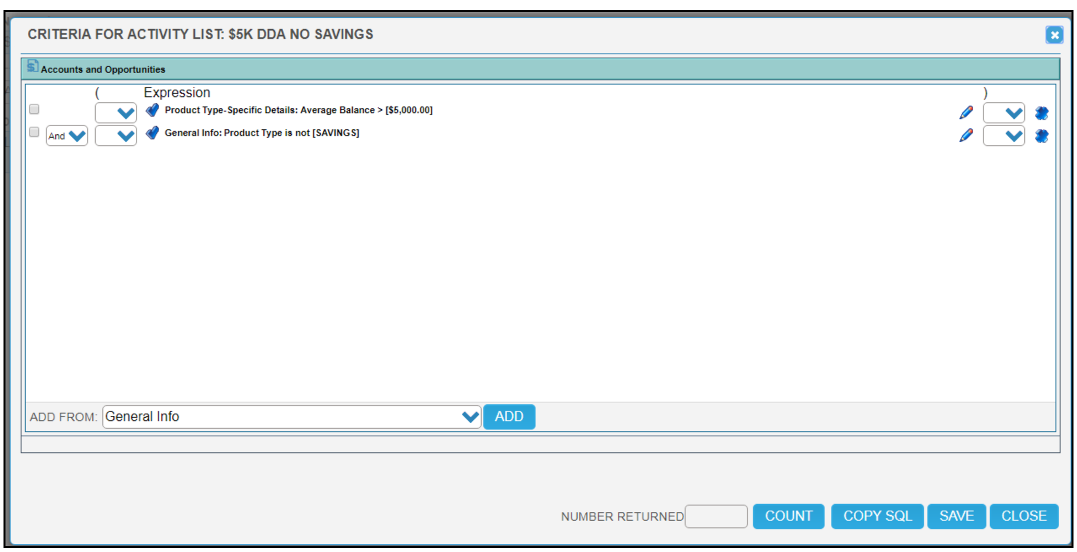


3. Edit the **Name** or **Description** of the list.

Note: The list type is locked once originally saved. If you need to change the type you will need to create a new list.

4. Hover over the **Membership** menu option at the top of the page and select **Edit Criteria** .The **Criteria for Contact List**/ **Criteria for Activity List** page is displayed

5. In that page, you can remove, add, or re-group any filter that you like.



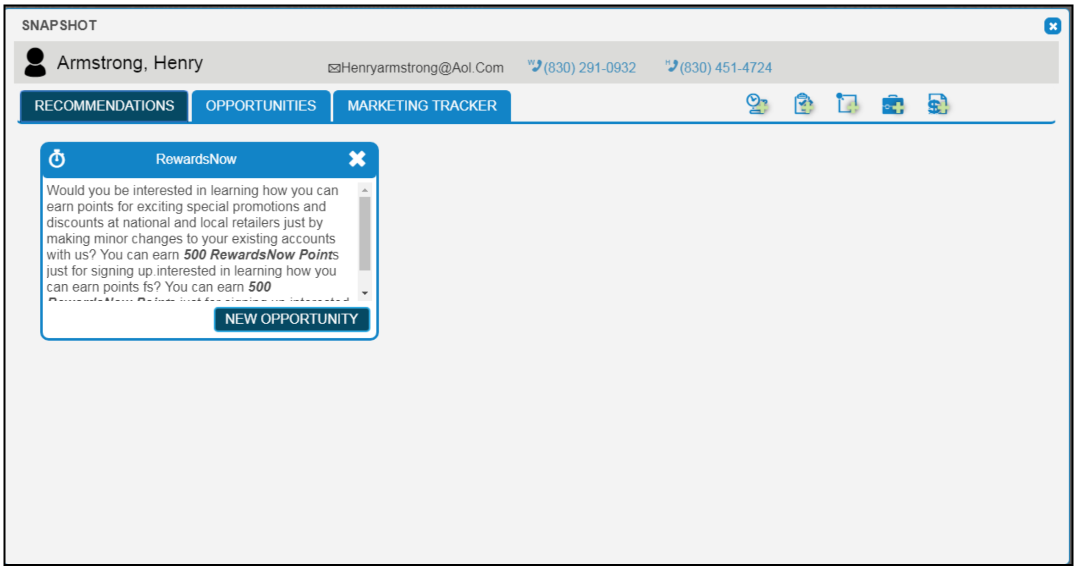
6. Click **Save**.

Creating a marketing campaign to recommend products

Marketing Campaigns is located in **Marketing > Campaigns**.

The Marketing Manger can prompt your employees to recommend products to contacts as they work with them. This feature can be accessed from either the contact search page when you look up a contact or if your institution has the ability to send ResourceOne the appropriate information, a pop-up window can be triggered to appear from another internal application, such as a Teller platform.

Product recommendation example:



From the **Recommendation** tab employees can:

- View products that should be recommended to the contact based on certain criteria defined by the Financial Institution.
- Use the suggested script to appropriately recommended products.
- Send a referral or create a pipeline for the recommended product.

  This action creates a new opportunity and removes the recommendation from the snapshot window.

- Identify that the contact has requested to be reminded at a later date.

  This action hides the recommended product until the period of time selected has elapsed.

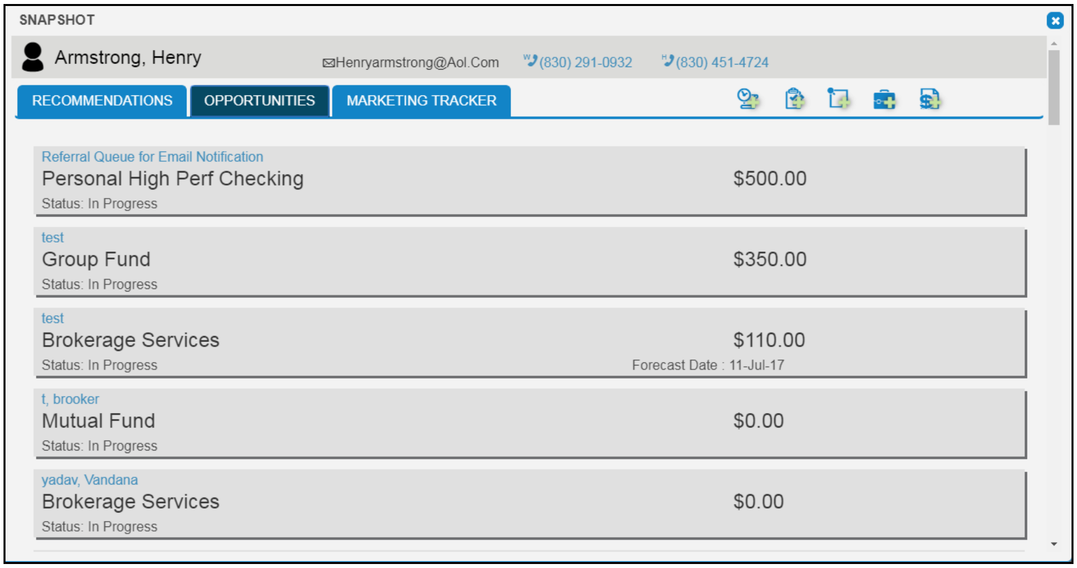
- Indicate that the contact is currently not interested and has declined the offer.

  This action creates a Lost Lead on the contact record for the recommended product and removes the recommendation from the snapshot window.

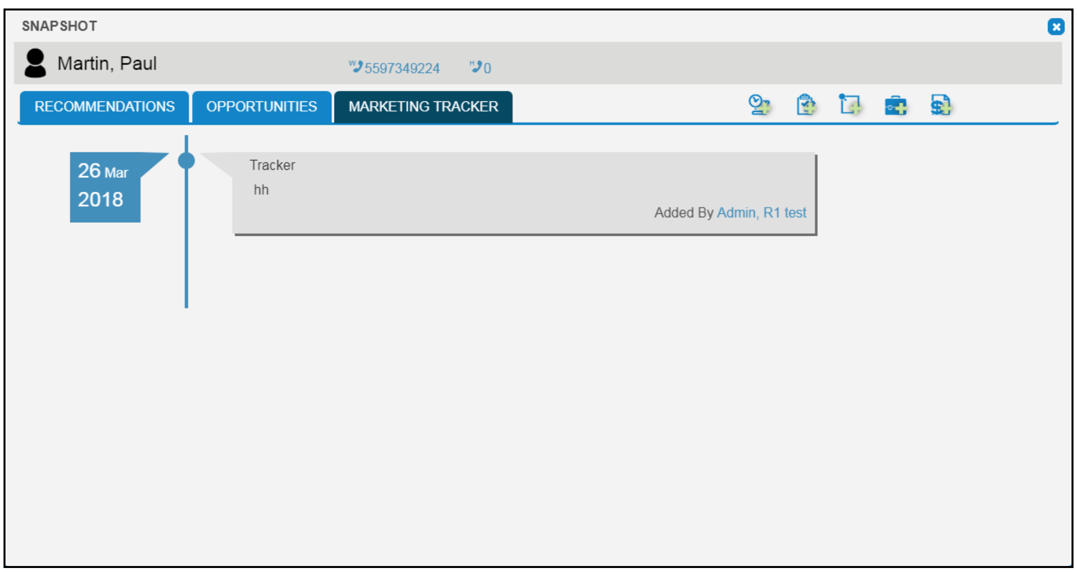
- Using the icons in the upper right create a new Event, Task, Note or Case for the contact (or open the contact record using the icon in the upper left corner).

From the **Opportunities** tab employees can:

- Review all active opportunities open for the contact.
- Add new opportunities for any additional products and services.



From the **Marketing Material Tracker** tab employees can review any attachments added by a marketing campaign.

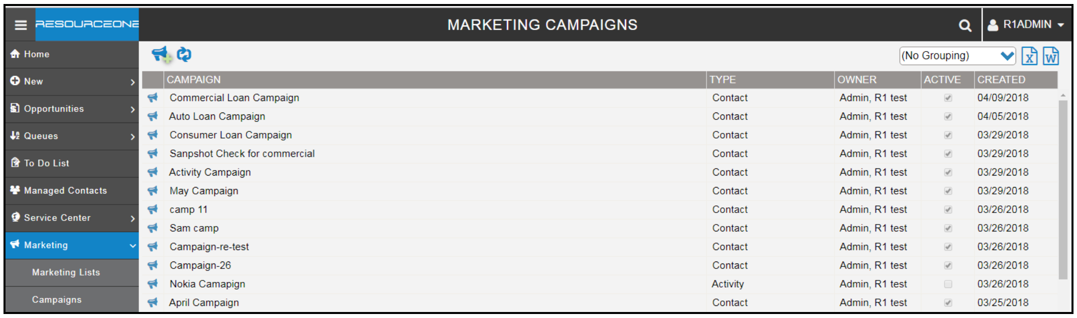


Creating a new campaign for recommended products

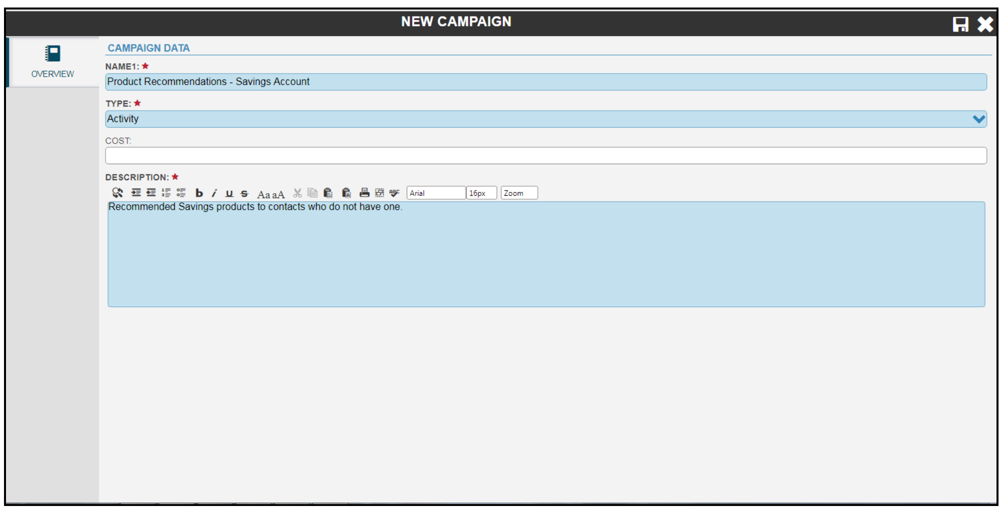
This section provides the information on creating a new campaign.

To create a new campaign

1. Go to **Marketing** > **Campaigns**. The **Marketing Campaigns** page is displayed.



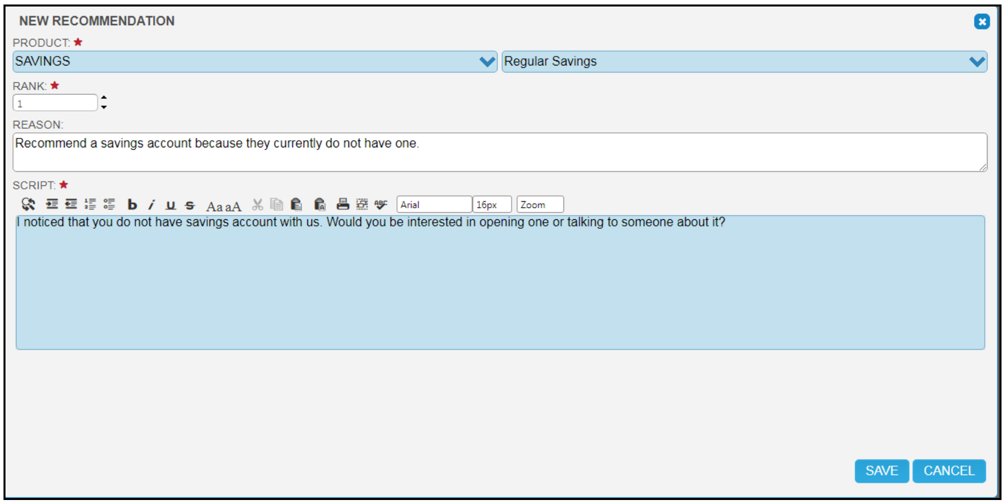
2. Click the  button. The **New Campaign** page is displayed.



3. Enter the following information:
   - Enter the campaign **Name**.
   - Select the **Type** of campaign: **Contact**, **Activity**.

- In **Cost**, enter how much the campaign cost. This is an optional field and will only display in the Campaign Summary report.
- Enter a **Description** of the campaign.

4. Click the  button. Once saved, you will see additional options to complete the campaign for recommending products.
5. Click the **Campaign Items** tab on the left side of page.
6. Click the **Product Recommendations** tab and click **Add Recommendations** . The **New Recommendation** page is displayed.



7. Enter the following information

- Select the **Product Type** and **Product** that you would like to recommend based on the filters from the list you have imported.
- Select the **Rank** the product

Note: Higher the product ranking, the product will be listed higher in the recommendations.

- Enter a **Reason** for the product recommendation.
- Enter a **Script** employees can use when recommending this product.

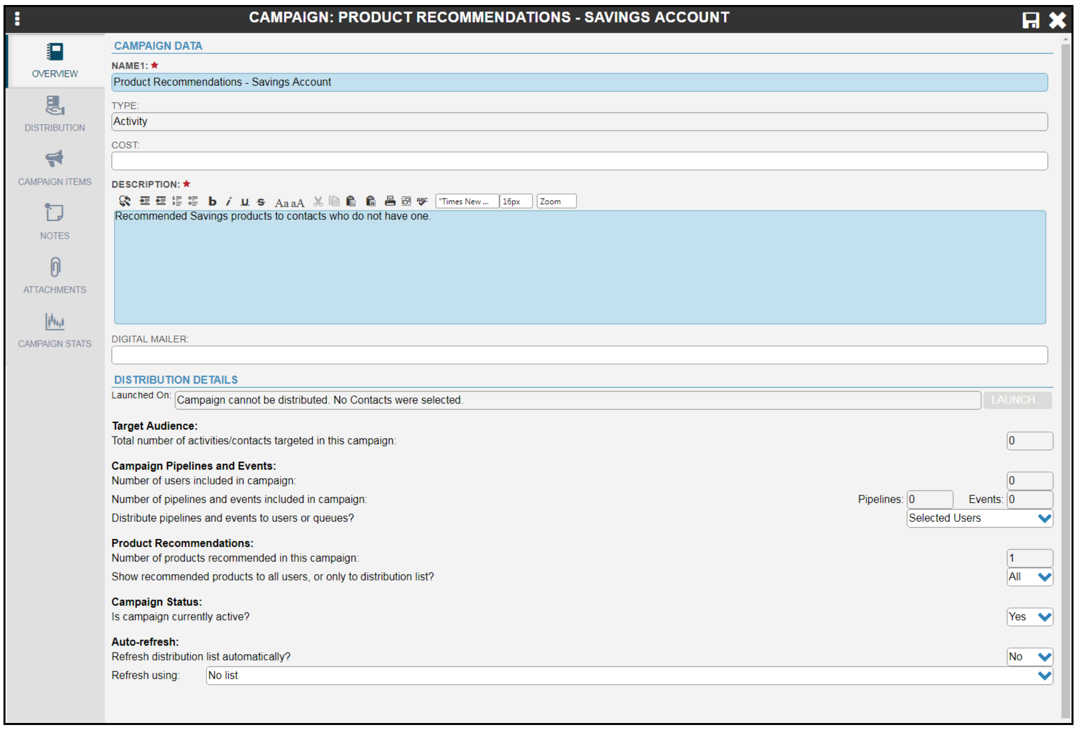
8. Click **Save**.

Distribution / View product recommendations

Once the product recommendations have been built, you will see the details on the overview page of the campaign. Under the product recommendations portion of the page (bottom of screen), you will have the option to show recommendation to all users or only users in the distribution list.

Note: For more information on how to add users to a distribution list, please see the Marketing Campaigns - Distribution section of this guide.

Product recommendations can also be activated and inactivated using the bottom dropdown options. When inactivated, product recommendations will not be displayed for your contacts.

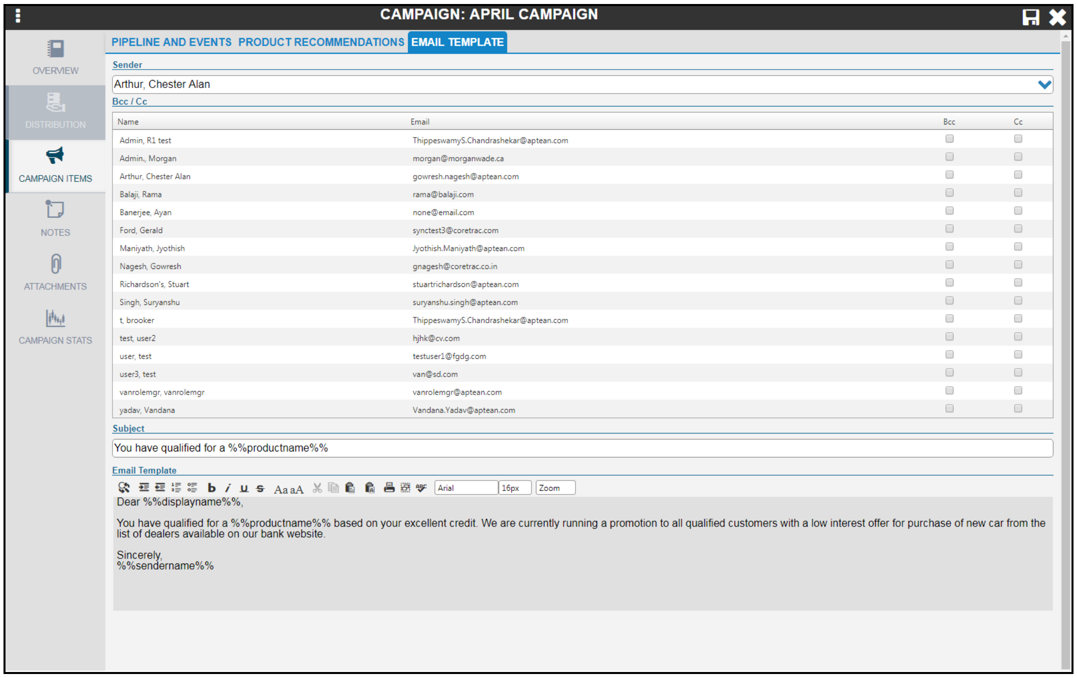


5

Mail Merge

Mail merge

Mail merge will allow users that have permission to Campaigns to setup plain text email templates to send to contacts in the campaign. The **Email Template** is the fourth option within the **Campaign Items** tab:



Sender: This is the user who will be identified as the **Sender** of all emails. Any active user with permission to **Send Email** will appear as an option to select.

Bcc / Cc: This is the remaining list of users from the Sender list. A campaign user can blind copy or carbon copy any emails to users that have **Campaign > Send email** permission that are sent for the campaign to customers.

Subject: The subject can be any text. Replacement keys enclosed in %%somekey%% can be placed in the subject line to automatically replace the data. See example of xml template lookup data below.

Email Template: The email template can be any text. Replacement keys enclosed in %%somekey%% can be placed in the subject line to automatically replace the data. See example of xml template lookup data below:

XML data lookup example: This example illustrates the campaign email data lookup. The key sendername can be used in the subject or email template as %%sendername%%. When the email is processed prior to being sent, the %%sendername%% will be replaced with the value “Arthur Chester Alan”. This value, which is auto-generated, corresponds to the user that was chosen from the Sender selection.

The following replacement keys are standard and will pull the corresponding data from your contact list: companyname”, “firstname”, “lastname”, “displayname”

Example of subject: You have qualified for a %%productname%%

Example of email template:

Dear %%displayname%%,

You have qualified for a %%productname%% based on your excellent credit. We are currently running a promotion to all qualified customers with a low interest offer if you buy a new car from the list of dealers found on our banking website.

Sincerely,

%%sendername%%

Result example of subject after auto processing: You have qualified for a Low Interest Auto Loan

Result example of email template after auto processing:

Dear Bob Jones,

You have qualified for a Low Interest Auto Loan based on your excellent credit. We are currently running a promotion to all qualified customers with a low interest offer if you buy a new car from the list of dealers found on our banking website.

Sincerely,

Arthur Chester Alan

In the example above, options like %%sendername%% and %%productname%% are optional and configured by CoreTrac Support. Please contact CoreTrac Support with questions (coretracsupport@aptean.com).

When distributing the campaign, an email item will be created based on the Campaign email template parameters for the email. The email will be queued with the subject, sender, Bcc / Cc, and body of the email for the current campaign distributed list. As a reminder, campaigns can be partially distributed.

6

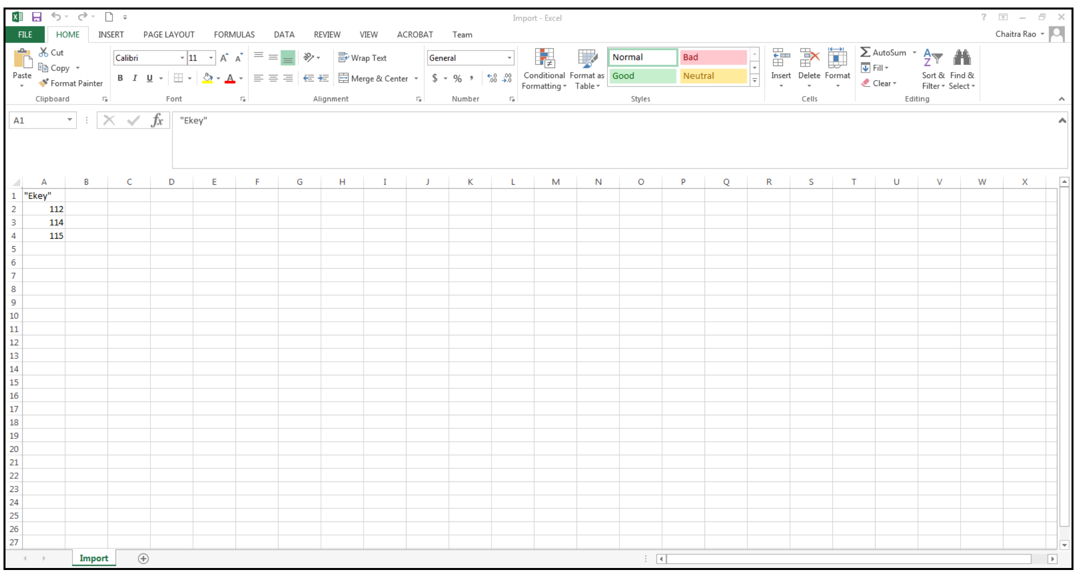
Importing External Campaign Lists

Importing External Campaign Lists

If your Financial Institution uses other software programs to produce marketing campaign lists, you can import those lists into ResourceOne for the purposes of pipeline and event distributions along with product recommendations.

The rules to import list are as follows:

1. All contacts must be existing contacts (customers/members that have a unique identifier in ResourceOne, this is typically SSN or Member number).
2. The file type needs to be in a .csv format and a column header will be required. For example, you can use “Ekey” (for ExternalKey_ID as the column header) and for the unique identifier, SSN or Customer/Member Number will be used. Whichever value (SSN or Customer/Member Number) has been mapped from your core as the unique identifier for your clients will be the value required in your external list file. All values should be included in double quotes. See the example below:

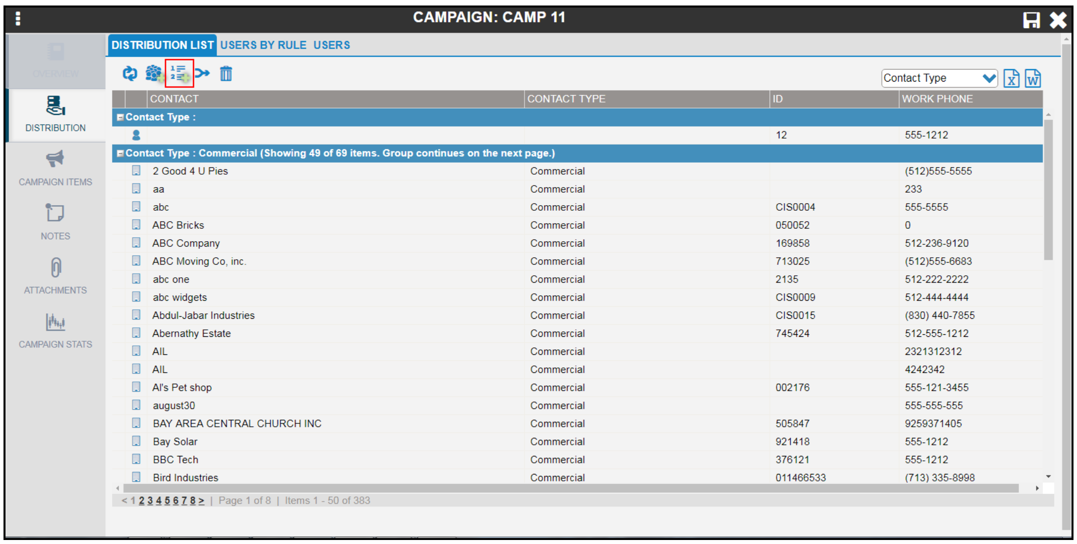


Importing a list

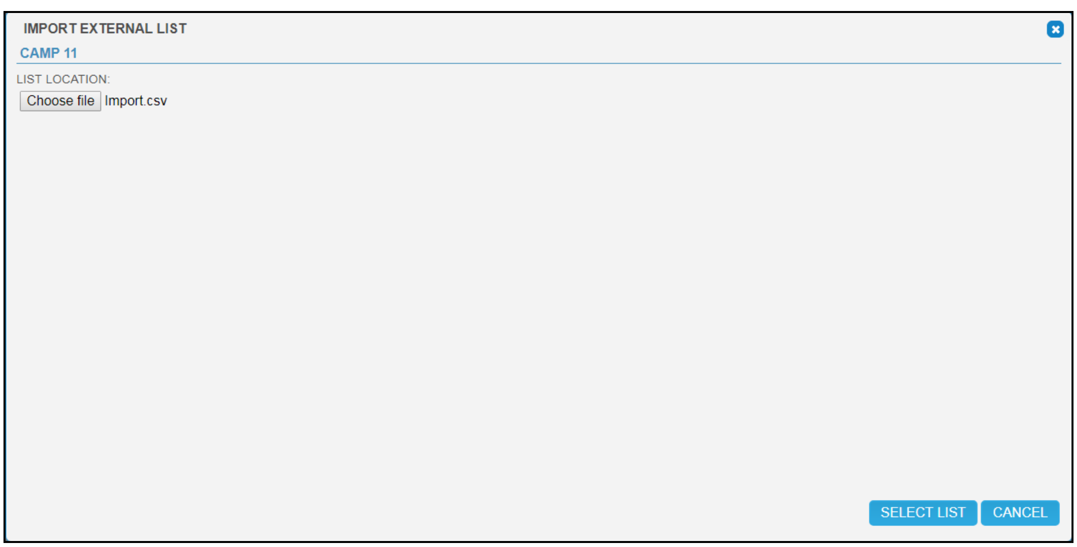
This section provides the information on importing external list.

To import a list

1. Create a new campaign and save.
2. Click the **Distribution** tab. The **Distribution List** page is displayed.
3. Click the  button to add external list. The **Import External List** popup is displayed.

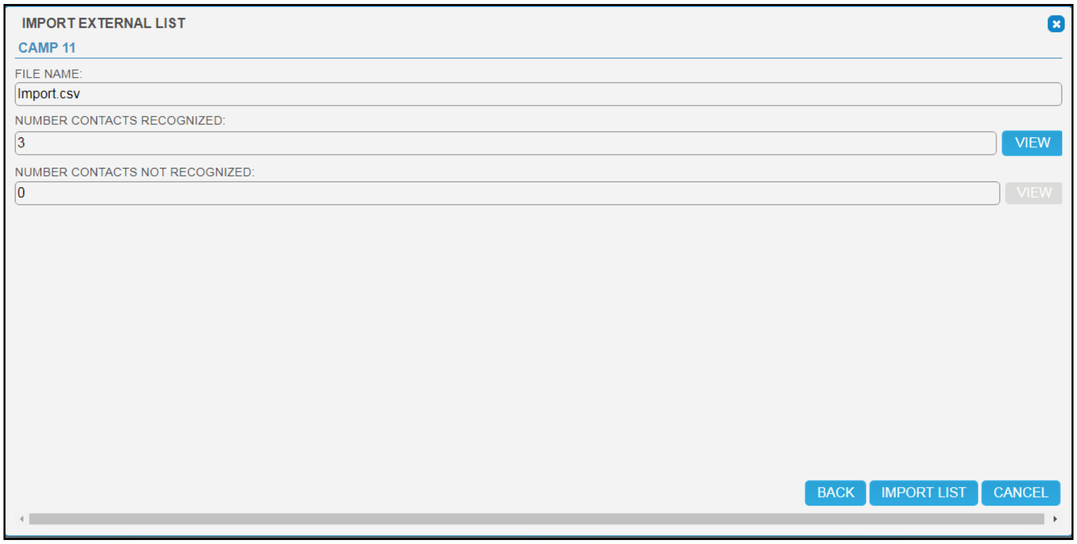


4. Browse to the location of the external list that you would like to import. Click **Select List** .



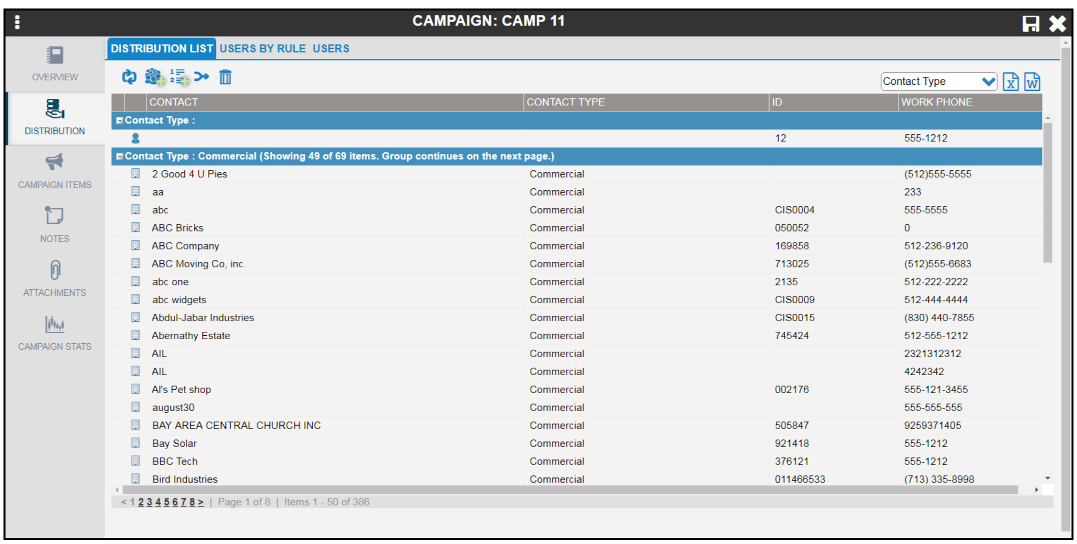
The following page is displayed. From this page, you can view all of the contacts that are recognized and are not recognized for import allowing you to make adjustments.

5. Click **Import list** .



Once saved, you should see the list populate within the campaign.

Note: To add pipelines, events or recommend products based on the imported list , please follow the additional instructions under the section `Campaign Items` of this guide.



7

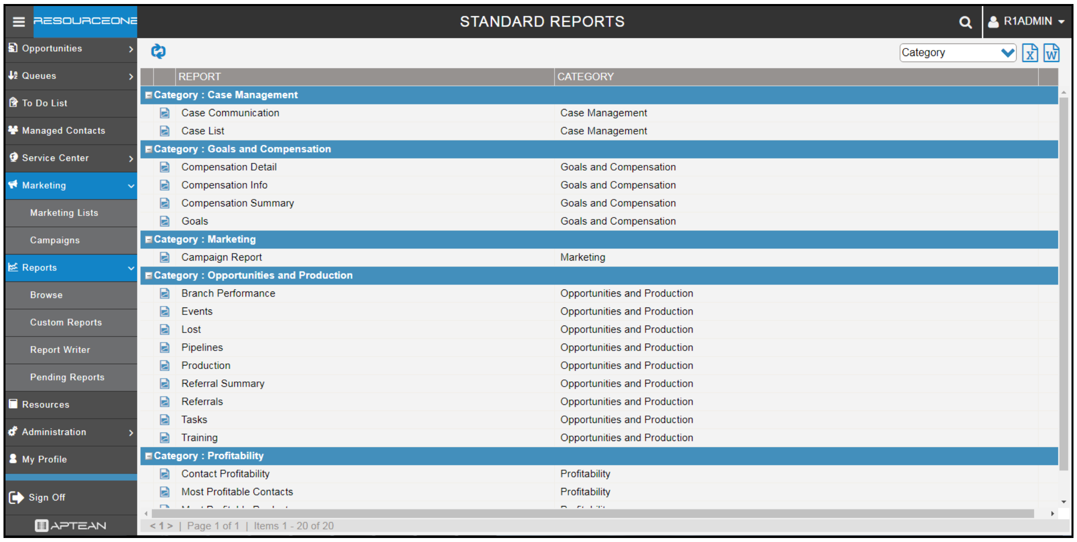
Reporting for Marketing Campaigns

Reporting for Marketing Campaigns

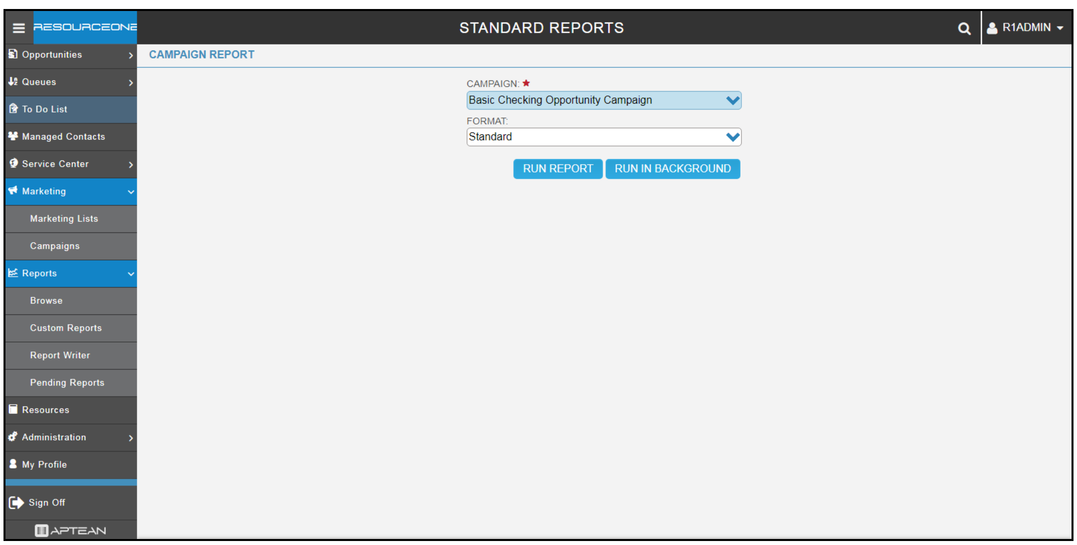
A status report can be generated to provide information about a campaign that has been launched.

To generate a report

1. Go to **Reports** > **Browse**. The **Standard Reports** is displayed.



2. Click **Campaign Report** under **Category: Marketing**. The **Campaign Report** page is displayed.



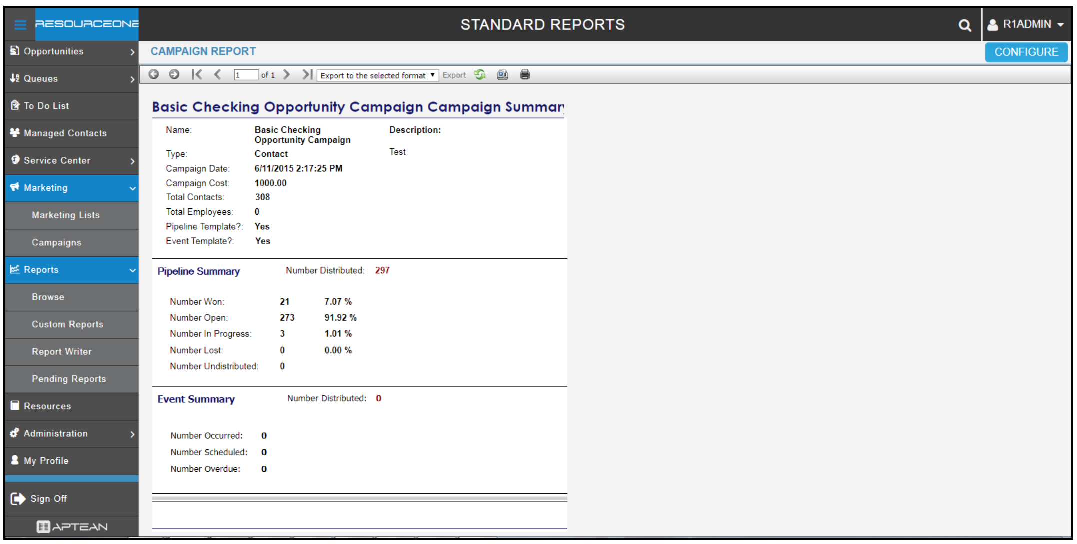
3. Select the **Campaign**
4. Select the **Format** in which report to be generated.

5. Click one of the following

- **Run Report** - To generate and display the report immediately.
- **Run in Background** - To process the report generation in background. Users can view this report under **Reports > Pending Reports** when the process status is completed.

Note: The **Run in Background** option is typically used when reports with large amounts of historical data are required.

The following image shows the display results or status of campaign items (Pipelines, Events, and Recommendations) when user clicks **Run Report**.



Note: Please keep in mind that the data in your report will be reflective of the Campaign Items you have used (you may not see data for all three categories).