User guide – Mailings

This guide accompanies the new version of Vital Statistics Mailings, released on 11/08/2009. This area of Vital Statistics allows you to build a mailing around a customer profile you have created – you can then download the customer list for your mailing and report on the responses of your customers.

Getting started

The customer lists used in Mailings are drawn from a **Customer Profile**, so you must first create this profile. If you need assistance with this, search in the Knowledge Base for 'Profiles' and take a look at the tutorials and articles you will find.

You will find **Mailings** in your **Tools** menu in **VS**.

Mailing summary page

New Mailing

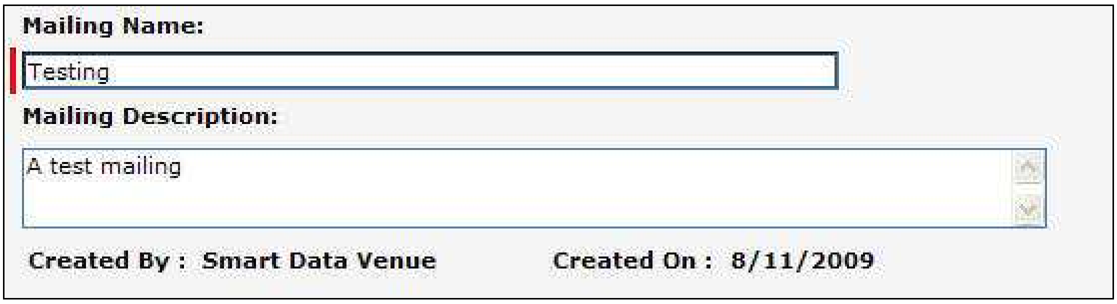
Edit	Remove	Mailing Name	Unit Cost	Quantity	Total Cost	Mailing Date	IsGenerated
Edit	✕	A test	$0.50	25,117	$12,558.50	8/11/2009	True
Edit	✕	A test 2	$0.20	20,709	$4,141.80	8/11/2009	True

When you first enter the Mailings area you will see a **summary page**, above. This will list all of the mailings in your VS account. From this page you can click to **Edit** existing mailings or **Remove** them. You will be able to see the **Mailing Name** for each one, the **Unit Cost** and **Total Cost** for each mailing you sent, the **Quantity** of customers you contacted, the **Date** on which the mailing was created and whether the mailing is **Generated** or not (if it is then the mailing settings are locked, and the system will be reporting on the responses of your customers).

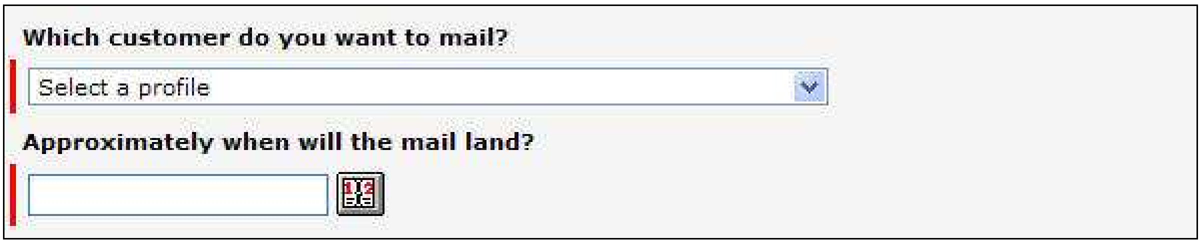
From this page you will also see (on the top left hand side) that you can create a **New Mailing**.

Setting up a Mailing

The first thing to do is to name your mailing – you will see below that the **Mailing Name** is a required field, and you can also add a Mailing Description if you wish to add extra information. You will also see who created the mailing and when it was created.



The next step is to tell the system who you want to send your mailing to (below). This is defined by the customer profile you have already set up, so just pick your profile from the drop-down list. You also need to tell VS when your mailing will be received by your customers (the landing date). This date will tell the system when to start reporting on the ticket-buying behaviour of your customers.



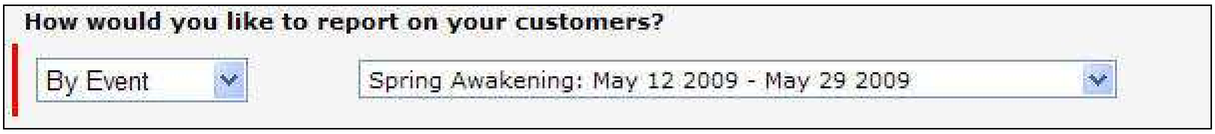
I have decided that I want to send my test mailing to all customers in my 'Testing' profile and know that my mailing will reach my customers on 08/05/2009:

Setting up a Mailing continued

You then have three options which define how you would like to report on your mailing. You can choose the **No Evaluation** option – if you just want to download a customer list and don't want to evaluate the mailing then choose this option. The **By Event** option will allow you to pick one future event run from your database. Then, each time a customer who is included in your mailing purchases tickets for that event after the landing date their purchase will be counted as a response. The **Until a Date** option allows you to pick a future cutoff date for your mailing. Then, each time a customer who is included in your mailing purchases tickets for any event in your database between the landing date and the cutoff date their purchase will be counted as a response.

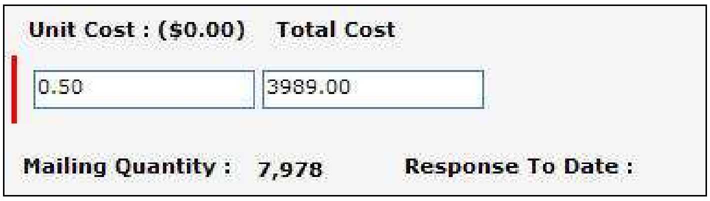
If you have chosen the **No Evaluation** option then you have finished inputting the settings for your mailing – go to the **Saving and Generating** section below.

If you have chosen the **By Event** option you will need to choose the event you want to report on from the drop-down list. I have chosen Spring Awakening as the event I want to report on, below:



If you have chosen the **Until a Date** option you will need to enter a cut-off date in the following box. I this case, I have chosen to report on this mailing from the landing date I have entered, of 08/05/2009, to the cut-off date of 08/06/2009 – I am reporting on the customer responses for a month.

Having chosen one of the reporting options, you will then need to tell the system how much money you spent on your mailing (below), so that it can calculate your return on investment. You can enter either the **Unit Cost** or the **Total Cost** and VS will work out the other for you, based on the quantity of customers you mailed (which is itself based on the number of customers in the **Customer Profile**).



You will see at the bottom of the page that there is a summary of the number of customers included in the mailing (**Mailing Quantity**) and the **Response to Date** – the percentage of customers who have so far responded by booking tickets according to the reporting settings you have chosen.

Saving and Generating

Once you have finished entering the settings you have entered into your mailing, you can do one of two things – Save or Generate (both buttons are found at the top of the Mailings page). If you pick **Save Mailing** you will simply save the settings you have chosen. When you click **Generate Mailing** (which you can do without having to click **Save** first) your mailing will be locked, your customers flagged, and your reporting activated.

Don't panic about generating your mailing - you can **Degenerate** it afterwards if you need to change the settings.

Once you have **Generated** your mailing, you can click on **Export Customers** at the bottom of the mailing page to export your customer list. Once your mailing has landed, you will be able to view the customer response to that mailing by clicking on the **Mailing Report** button.