VisionVPM

Sending Mass Communication using email in VisionVPM and Rapport

This document describes how to quickly and easily send out a mass communication email to your clients for special events or important information. We generate the list of recipients from VisionVPM before uploading and sending the communication from Rapport.

Considerations

Consider the Clients you wish to target. Options include but are not limited to:

- All Active clients with an email address
- All Active clients with an email address with at least one alive and active animal
- All Active clients with an email address with at least one alive and active animal that has a last visit date since 1 JAN 17

Using the Marketing Schedule in VisionVPM, each of these searches are possible and can be narrowed down further if required.

For the purposes of this document, we will be using All Active clients with an email address with at least one alive and active animal that has a last visit date since 1 JAN 17.

Perform the Search

- 1. Go to Clients Menu > Marketing Schedule > Insert
- 2. From the **Client** tab, enter **Y** in the **Has Email** field
- Note: by default the search will be looking at Active clients, that is, Not Inactive

Marketing	Search		Save F7 Cance	el F8 Run/R		
<u>Client</u> <u>Animal</u>	Cli <u>n</u> ical Ir	voice Dptions	Search Invo	pice Details		
🔬 Client Record	ls					
Contacts to match (Primary Contac	t 🔘 All Contacts	Include contacts r	not marked to receive	marketing	
Clients street			2nd Street			
Clients suburb		-	City			
Postcode			Marker Options 1		*	
Notes contain			Marker Options 2		•	
Spent between	and	ł	from date	to		
Last payment from	to		Last verified from	to		
1st visit date from	to		Distance >	Credit limit >		
Has email	Y Can email	Inactive N	Bad debtor			
Has Mobile No	Can TXT		Use Direct Debit			
Account Fee	Add Interest	Syndicate	Zero Rated GST			
Never send account	Always s	end account	Star Client			
Visual Reminder No		-	Preferred Clinic			-
Contact Method		-	Contact Role			-
Custom fields 1-4		•				•
Multiple Client Groups						Select C
Client Group		•	Group closing date betwe	en a	nd	
		10000				



- 3. From the Animal tab,
 - Enter N in the Inactive field to search for Active Animals.
 - Enter a last visit between range between 1 JAN 17 and a future date i.e. 31 DEC 20

Note: by default the search will be looking at Alive animals

Marketing	Search			Save F7 Cancel F8 Run	<mark>/</mark> B
<u>Client</u> Animal	Clinical	Invoi	ce <u>O</u> ptions	Search Invoice Details	
Animal Recor	ds				
Breed	Selected	Breeds		Notes contain	
Species	Selected	Specie:	3	Desc contains	
Classes	Selected A	nimal (Classes		
Born between		and		Ignore the year of the birthday	,
Sex		1	Neuter	Inactive N Microchip No	Zero Rated GST
Current Status	O N/A	Alive	O Decease	d 🔘 All animals	
Current Weight		(ka)	Belative weigh	(ka)	
Body Score		10.30	Dental Score	1.21	
The second second		i Transa			
First Visit Detween	4 1441 47	and	01.050.00	1	
Last Visit Detween	LJAN 17	and	31 DEC 20		
Custom fields 1-4			-	<u> </u>	-
Equine location			-	Sire 🔹	
ultiple Animal Groups					Select Clea
Animal Group			- Anal	vsis closing date between	and
Visual Reminder No			-		
Referrals	Animals wi	h Refe	rrals		Boarding
Vets Name			+ Hos	pital 🗸	Boarding start date from
Suburb				City	to

4. From the **Options** tab, select **One record per client** under the **Duplicate record options**

						Save F7	Cancel F8	Run/
<u>C</u> lient	Animal	Clinical	Invoice		Options	Sea Sea	ch Invoice D	etails
Date	type optio	ns:						
					11	ast week		
Clie	ents amount s	pent during	date type:	0	2. Li	ast fortnight		
CI	ients last pay	ment during	date type:	0	3. La 4. La	ast month ast 2 months		
	Clients firs	visit during	date type:	0	5. La	ast 3 months		
Stock	/sales group	purchased	date type:	0	7. L	ast 6 months ast 9 months		
	Clini	cal records i	date tune:	0	8. La	ast year ast 18 months		
	- Control	0011000100	dato (Jpo.		10.1	_ast 2 years		
Extr	a options:							
100	Lise 'or' sea	rches within	client and	lan	imal modules			
	Display rec	ords NOT m	atching the	e cu	irrent search	criteria		
Dup	licate reco	rd options:	5					
0	Default (cle	ar dunlicate	records pe	r cli	ient/animal)			
۲	One record	per client						
0	One record	per animal						
0	Do not clea	r duplicates						

5. Run the search. You will be prompted whether to save the search which is optional.



6. Review the search results. Use the Clear Lines button to remove any clients you do not wish to contact.





Send VisionVPM list to Rapport

1. Select the Merge button



2. Select Upload to Rapport. Leave all other defaults and select Ok.



- 3. In the Media Centre Campaigns window:
 - Give the Campaign upload a name
 - Select Email
 - Select Client Data
 - Click Upload

Media Center Campaigns app Clients in the list to upload: 791 Campaign upload name Change to Practice Times - March 2020 Send campaign by Campaign based on Txt 💿 Client data 0 💿 Email) Client and Animal Data Postcard 🔘 Reminder Data 0 Multimedia (requires a template) 6 (Optional) Base on Template matching Email, Client data Download latest templates Upload <u>C</u>ancel



4. You will receive the following success message. Select OK



5. Select Yes to open the campaign



Prepare Campaign in Rapport

1. Select the Campaign Name from the list

Created	ID	Name	Source	support	Туре	Status
19/03/2020	7	Change to Practice Times - March 2020	Upload	Email	General	In Preparation

- 2. Under the Media & Messages section
 - Use Edit to compile the message you wish to send.
 - To preview, select the envelope icon.

	MEDIA & MESSAGES
Email	edit

3. On the edit screen, you can **Send Test Email** to a specified address.

ancel Preview	/ Test 🔻	
Show Preview		
Send Test Email	to Liz.zagalak@covetrus.com	

Note: It is strongly recommended to send a test email and open on both a desktop and mobile device to ensure that all content and images (if used) appear as intended.

VisionVPM, Rapport or Covetrus are not responsible for any text or image content in the emails you create and deploy.



Launch Campaign in Rapport

- 1. After all editing changes have been made and you are satisfied with the message, click Launch
- You will then have to click Launch This Campaign Launch This Campaign Note where the activation email will be sent.
- 3. You will need to access the email and click **Activate** from the email for the campaign to be processed and sent to clients.

Contacting the VisionVPM Service Desk

If you require help throughout the steps described in this document, please contact the VisionVPM Service Desk.

	New Zealand	Australia	
Phone	0800 847 876	1800 150 264	
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Document Information

Document Title	Sending Mass Communication using email in VisionVPM and Rapport
Created by	Liz Zagalak
Last Modified	19/03/2020 by Liz Zagalak
Current as of VisionVPM build	2019.33

