

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

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

The screenshot shows the 'Marketing Search - New' window with the 'Animal' tab selected. The 'Animal Records' section contains various search criteria. The 'Inactive' field is set to 'N', and the 'Last visit between' field is set to '1 JAN 17' and '31 DEC 20'. The 'Current Status' is set to 'Alive'. The 'Options' tab is also visible at the top.

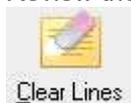
4. From the Options tab, select **One record per client** under the Duplicate record options

The screenshot shows the 'Marketing Search - New' window with the 'Options' tab selected. The 'Date type options' section is visible, along with a list of date types. The 'Extra options' section is expanded, and the 'Duplicate record options' section is selected. The 'One record per client' option is selected.

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

The screenshot shows a dialog box with a question mark icon and the text 'The record is not currently saved. Do you want to save this search?'. There are two buttons: 'No' and 'Yes'.

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

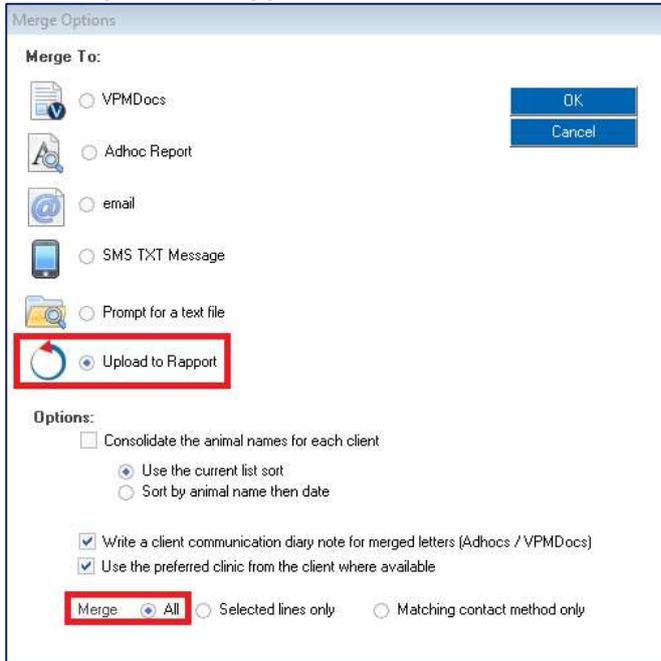


Send VisionVPM list to Rapport

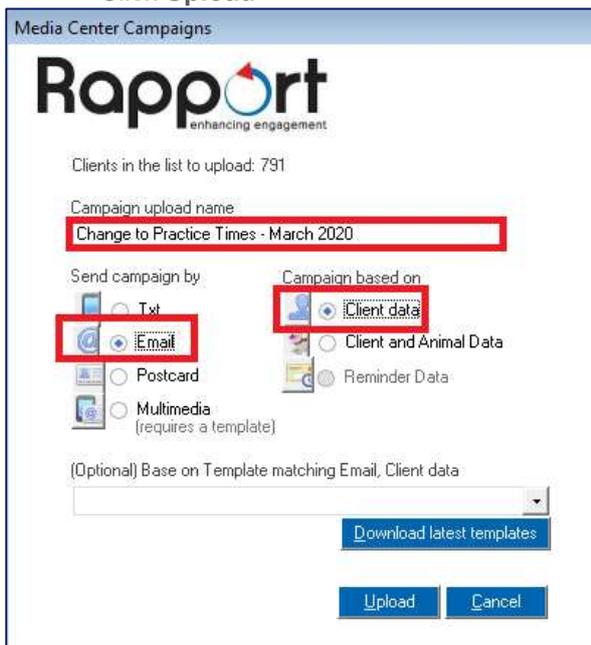
1. Select the **Merge** button



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**



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



5. Select **Yes** to open the campaign



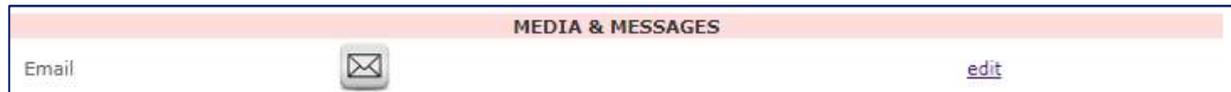
Prepare Campaign in Rapport

1. Select the Campaign Name from the list

Created	ID	Name	Source	support	Type	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.



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



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**

Launch

2. 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.

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