

Setting up the Direct Mail Manager

The topic of this article will be on setting up the Direct Mail Manager. The Direct Mail Manager operates as a separate data base you can hold direct mail records in. Since direct mail usually involves contacting a large number of people with a low rate of return, you do not want to create contacts for every mailer you send out. Instead you can hold the records in a separate data base and convert the records to a contact when needed. Keeping direct mail leads in a separate data base will prevent issues that can occur from having a large number of contacts that are not being used.

*You may need to request this functionality be activated by support before starting. If you do not find the "Search Mail Records" link available on the Contacts Tab please email support@debtpaypro.com to have the Direct Mail Manager activated. There is no additional fee for this functionality.

The CSV File

Before starting the process lets review the CSV file you will be uploading into the Direct Mail Manager.

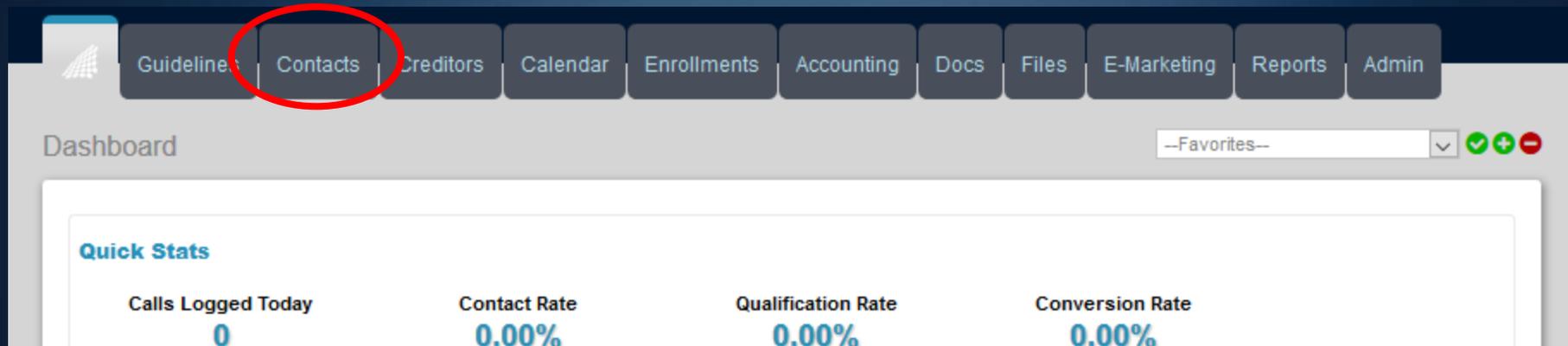
A CSV file is essentially a plain text spreadsheet or a unformatted Excel spreadsheet the system is able to read. If not already in the correct format you will need to make sure to resave the file as “CSV (Comma Delimited)”. Next you will want to make sure you have a header row, the following are some requirements and best practices for the header row.

- NO duplicate headers – make sure each column header is unique. Having duplicate headers can cause fields to not be mapped or a fatal error to occur during the upload.
- NO special characters – CSV files use some special character to designate information. It is best practice to have no special characters in the headers (i.e. *, /, &, \$, etc...)
- We strongly suggest to make the headers all lower-case
- Make sure headers are descriptive and properly represent the information contained in the rows below it. You will later use the header names to map the information to fields in the CRM.

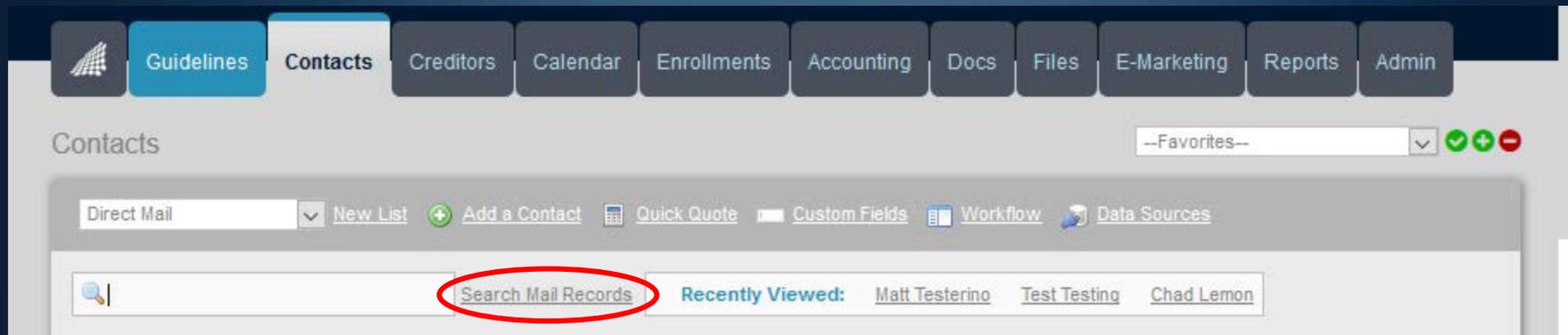
Once the file is ready to upload, again make sure to save the file as a “CSV (Comma Delimited)”. If you plan on doing a number of Direct Mail Campaigns we suggest asking the marketing company supplying the spreadsheet file keep it in the exact same format (keep the headers exactly the same) this will prevent problems uploading files to the direct mail manager and will prevent having to take additional steps in the future to re-map fields.

	A	B	C	D	E
1	id	firstname	lastname	email	phone
2	ABC1575	Test	Testing		555-555-5555
3	ABC1576	Dave	Test	david@debtpaypro.com	999-999-9999
4	ABC1577	Test	User		
5	ABC1578	Tester			
6	ABC1579	TESTER			
7	ABC1580	DebtPay	Lemon		
8	ABC1581	Chad	Lemon		
9	ABC1582	marcus		marcus@debtpaypro.com	
10	ABC1583	test	test	adam.o@debtpaypro.c	222-333-4444
11	ABC1584	Test	Testing		555-555-5555

Start by going to the Contacts Tab

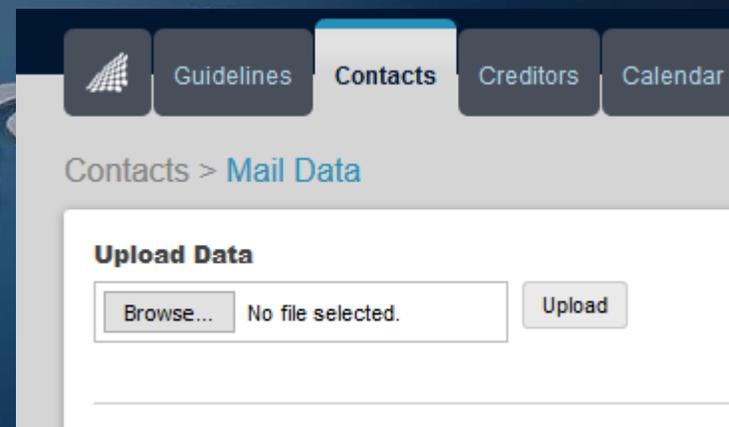


Once on the Contacts Tab Click on “Search Mail Records”



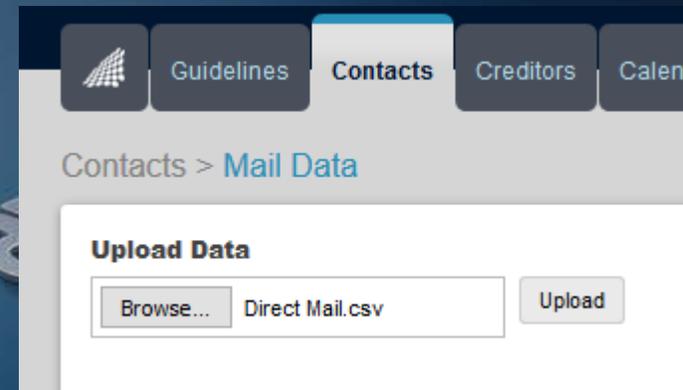
Uploading the CSV File

You should now find yourself on a mostly blank page except for an import tool to “Upload Data”. Here you will want to click the “Browse” button and select the CSV file from your local hard drive.



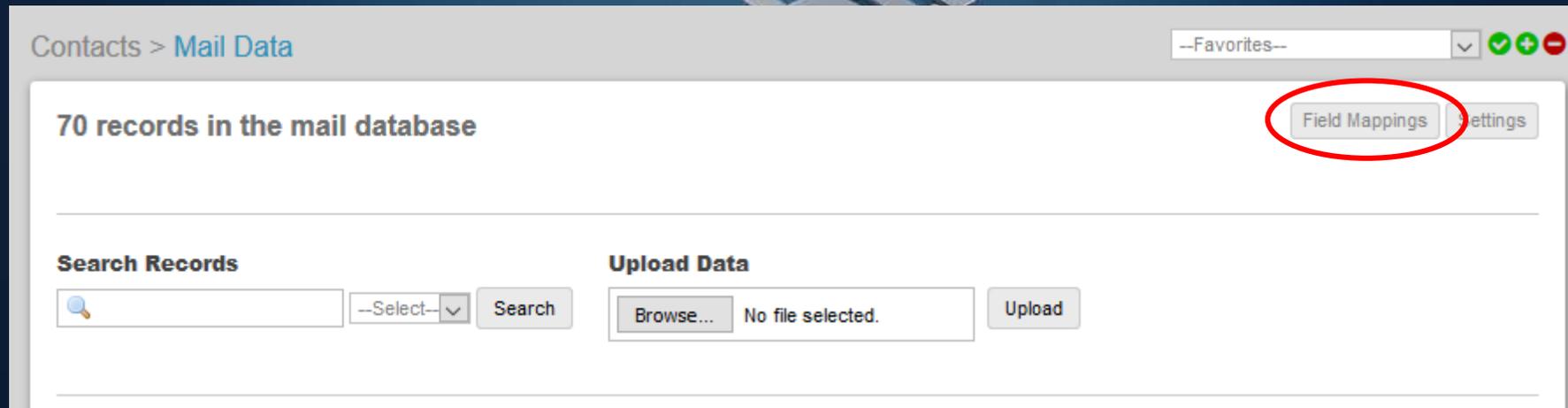
Uploading the CSV File

Once you have selected the file click the “Upload” button.



Field Mapping

Depending on the number of contacts you are uploading the system may take varying amounts of time to finish uploading the data; the more records the longer it will take. Once finished you will see the current number of records in the data base, in this case 70 records. The next step will be to map the fields with the column headers from the CSV file. Start by clicking “Field Mappings”.



Contacts > Mail Data

--Favorites--

70 records in the mail database

Field Mappings Settings

Search Records

--Select-- Search

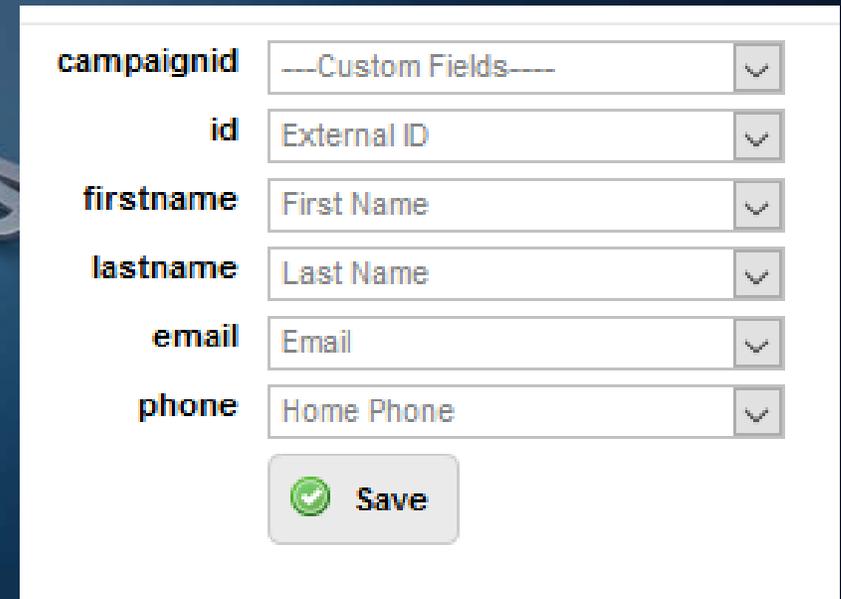
Upload Data

Browse... No file selected. Upload

Field Mapping

Once you click on the “Field Mappings” button a layover window will appear. On the left are headers from the CSV file. To the right will be a drop-down menu for each header where you can select a Standard or Custom Field to have information mapped (saved) to. Basically you are telling the system for each record you are designating what field the information under that column header will be saved. For example we have the header “firstname” mapping to its corresponding field in the CRM “First Name”.

*Please notice we have mapped the Direct Mailer Header “id” to the System/Standard field “External ID”. External ID is a system field meant to be used to save a outside systems ID. In this case we are going to map the Direct Mailer’s identification number to External ID so that later when searching converted mail contacts in the CRM you are able to search using the mailer ID. Usually Direct Mailers will have Identification number listed on them. You will use this to both locate the record in the direct mail data base or with it mapped to External ID, you can search for the record from the contacts tab using it (once it has been converted to a contact from the direct mail manager). Once finished click “Save”.

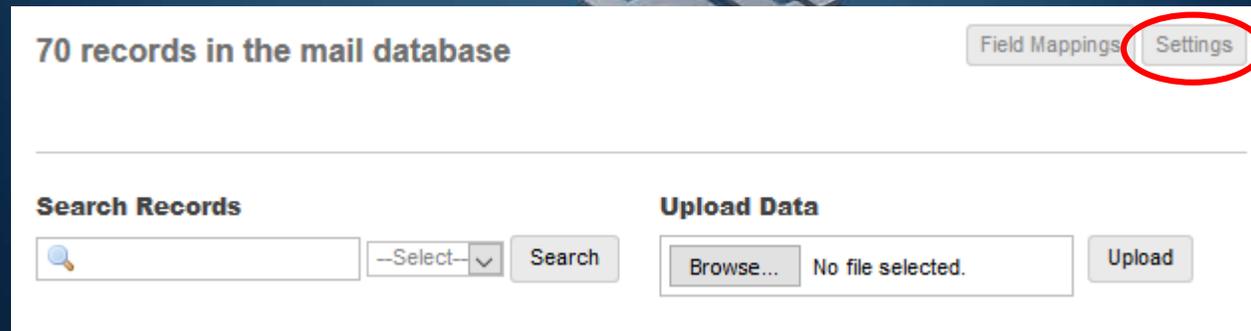


campaignid	---Custom Fields---	▼
id	External ID	▼
firstname	First Name	▼
lastname	Last Name	▼
email	Email	▼
phone	Home Phone	▼

 Save

Settings

Once you have finished mapping the fields we will not setup the settings. Start by clicking on the “Settings button to open the settings layover window.



70 records in the mail database

Field Mappings **Settings**

Search Records **Upload Data**

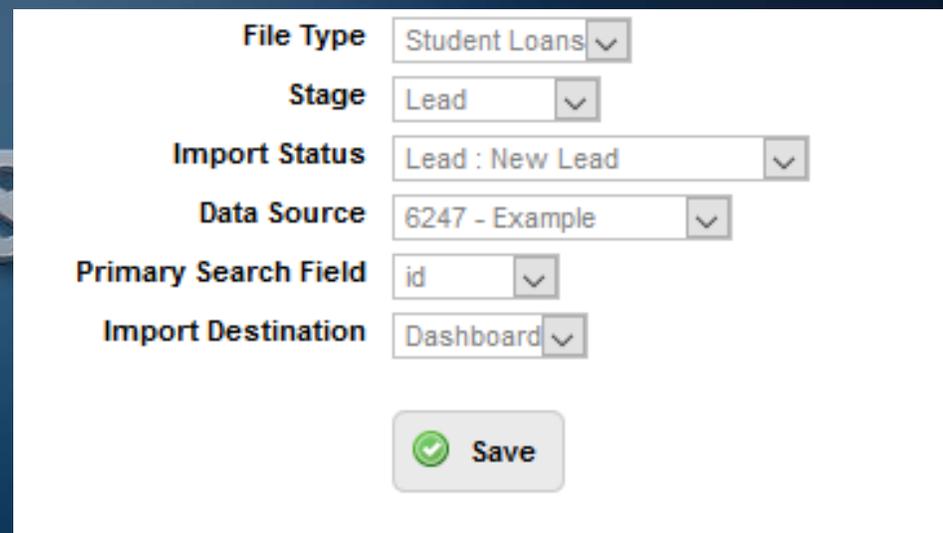
The screenshot shows a software interface with a white background. At the top left, it says "70 records in the mail database". To the right of this text are two buttons: "Field Mappings" and "Settings". The "Settings" button is circled in red. Below this is a horizontal line. Underneath the line, there are two sections: "Search Records" and "Upload Data". The "Search Records" section has a search input field with a magnifying glass icon, a dropdown menu with "--Select--", and a "Search" button. The "Upload Data" section has a "Browse..." button, a text field containing "No file selected.", and an "Upload" button.

Settings

In the settings layover window you will find some options for how the records will be converted to contacts.

- **File Type** – Type of contact being imported from the direct mail manager
- **Stage** – Workflow Stage the contact will be placed in once converted
- **Import Status** - Workflow Stage the contact will be placed in once converted
- **Data Source** – You can choose to assign a data source the contact should appear to be created from. You may want to create a data source from the contacts tab for this option.
- **Primary Field Search** – This is the default data point we will use to search the direct mail records. In our example we have set the Direct Mail's campaign ID for the search field. This means by default we will search the Direct Mail Records for records using the identification number provided by the Direct Mail Campaign.
- **Import Destination** – After converting the Contact you can either be directed straight to the Client Dashboard or the Edit Contact page.

After making your selections click “Save”



The screenshot displays a settings window with the following configuration:

- File Type:** Student Loans
- Stage:** Lead
- Import Status:** Lead : New Lead
- Data Source:** 6247 - Example
- Primary Search Field:** id
- Import Destination:** Dashboard

A **Save** button with a green checkmark icon is located at the bottom of the form.

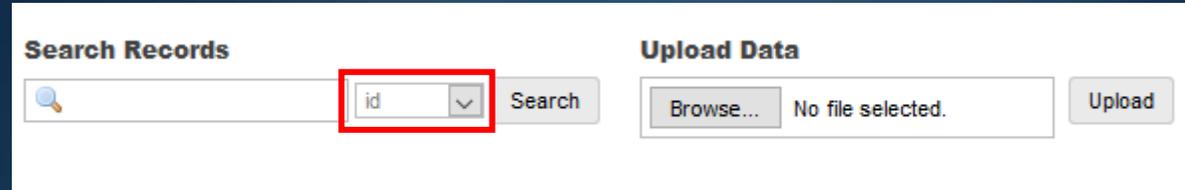
Searching Mail Records

Now that we have imported the CSV file, mapped the fields and saved settings we are now ready to search the records and convert one into a contact.

Start by going to the Contacts Tab and clicking on “Search Mail Records”.



Searching Mail Records



Search Records **Upload Data**

id No file selected.

Notice that the header “id” is the default search as we setup in the settings. You will also find the other headers listed as options so you can search by the other data points provided from the CSV file. We will demonstrate the search functions using the “id” as our parameter.

Searching Mail Records

Start by entering information in the search window. Try to enter the information verbatim to what was present on the CSV file for the record. In the example we are searching for the record using the direct mailer's ID "ABC1737" so the record can be located easily. If you searched using the records first or last name you may see multiple records listed since there may be . Since we used the Direct Mail Record ID we found the exact record we were looking for right away.

Once the records have been searched the available options will be displayed below the search bar. Verify the record is correct then simply click on any of the underlined data listed to be taken to the next step where we convert the record to a contact.

ID	SDATE	TMP CAMPAIGNID	TMP ID	TMP FIRSTNAME	TMP LASTNAME	TMP EMAIL	TMP PHONE
<u>538</u>	<u>0000-00-00</u>	<u>0</u>	<u>ABC1737</u>	<u>Test</u>	<u>Test</u>	<u>example@example.com</u>	<u>555-555-5555</u>

Converting the Record to a Contact

Once you have selected the correct record to be converted the system will display the record's information being transferred to the new contact.

Once you confirm all the information is correct, click "Convert to Lead". This will create the contact and map the information to the fields you designated under the "Field Mappings" layover.

	<input type="button" value="Convert To Lead"/>
id	538
sdate	0000-00-00
tmp_campaignid	0
tmp_id	ABC1737
tmp_firstname	Test
tmp_lastname	Test
tmp_email	example@example.com
tmp_phone	555-555-5555

Converted Contact

As you can see from the record we converted for our example the name, phone number, email, etc.. has been copied over to the Contact.

Also the External ID is listed right below the Customer ID. You will be able to search for this contact using that External ID. That way the contact can simply hold on to the mailer they originally contact you with and provide the Mailer ID (External ID) when contacting you so the contact can be easily located.

The screenshot shows a CRM record for a contact named 'Test Test'. The record is categorized under 'STUDENT LOANS' and is a 'Lead : New Lead'. A green 'update status' button is visible. The 'External ID' is highlighted with a red box and is 'ABC1737'. Other fields include 'Customer ID' (TEMP-58134394), 'Assigned Company' (TEMPLATE), and a 'Change Assignment' link. A table of metadata shows creation and modification dates, data source, and contact information like email and phone number.

External ID	ABC1737
Customer ID	TEMP-58134394
Assigned Company	TEMPLATE
Created At	04/07/2016 12:24 pm - Support Support
Modified At	Never
Assigned To	Support Support
Data Source	Example
SSN	N/A
Birthday	N/A
Email	example@example.com
Home Phone	555-555-5555