

Quick-start Guide: Creating and Executing a Basic Dialogue

Introduction

This Quick-start Guide will take you through, step-by-step, the actions required to create and execute a basic Dialogue. The Guide is intended for users that have already been trained on how to create new Selection files and Message templates.

As your Visual Dialogue skills increase, this basic Dialogue template can be duplicated and elaborated for multiple on-going and/or single-event Dialogues in the future.

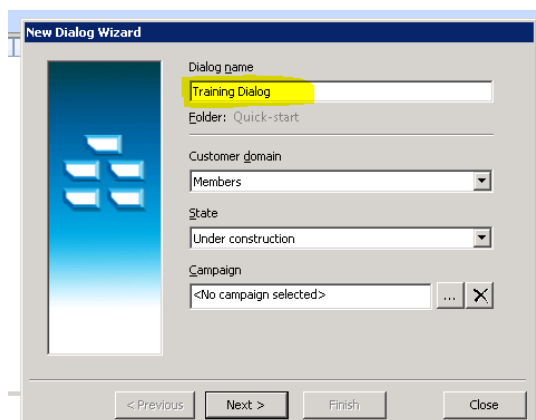
Good luck, have fun and remember if you get stuck or have any questions you can always email Sarah at Spark – sjfowler@spark.com.au

Stage 1: Creating the new Dialogue file

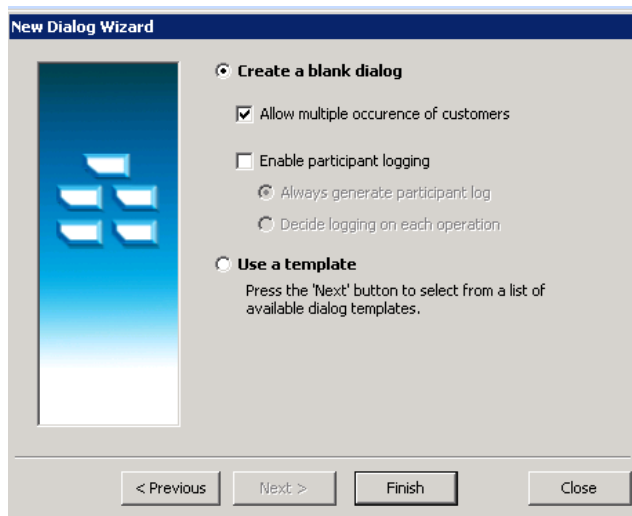
1. Go to the 'Create' tab and click on 'Dialogue' to create a new Dialogue. A Windows Wizard will pop-up.



2. Give your new Dialogue a name and leave other fields as pictured below. Click Next.



3. On this next screen, leave all fields as they are (pictured below) and click Finish. You now have a blank canvas to create your Dialogue.

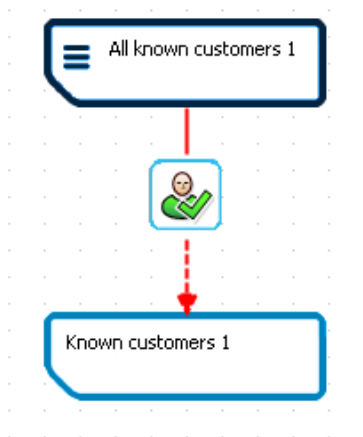


Stage 2: Designing the basic layout of your new Dialogue

4. Click on the 'Select' Operation Type from your Toolbox window on the right-hand side of the screen (icon pictured right).



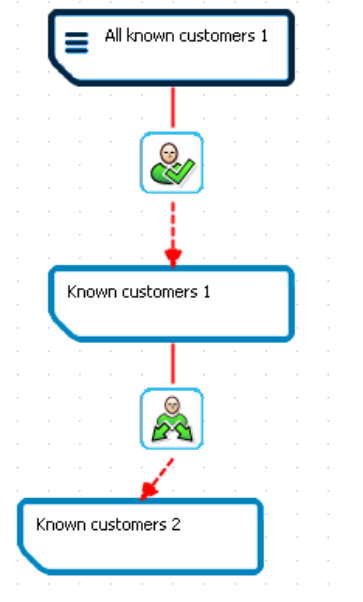
5. With the cursor draw a vertical line on the blank canvas. You will then be presented with a series of three pop-up boxes. For the meantime, simply click 'OK' to pass through them. Once your Dialogue is finished you can come back to these and refine the details. Your Dialogue should now look like this:



6. Click on the 'Divide' Operation Type from your Toolbox (pictured right), then draw a short vertical line downwards from the 'Known customers 1' group.

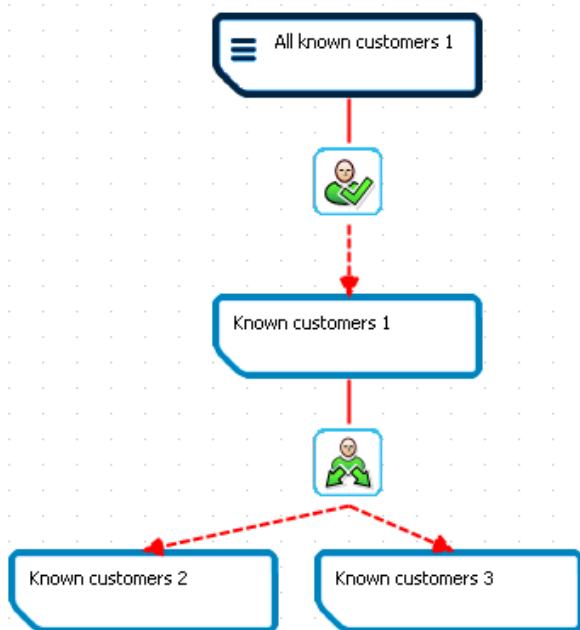


7. You will be presented with a series of two pop-up boxes. Click 'OK' to pass through them. Your Dialogue should now look like this:



8. Click again on the 'Divide' icon in your Toolbox and draw a diagonal line to the right from the 'Divide' icon in your Dialogue. You will be asked to select a Branch Type. Select 'Divide using selection' and click 'OK'.

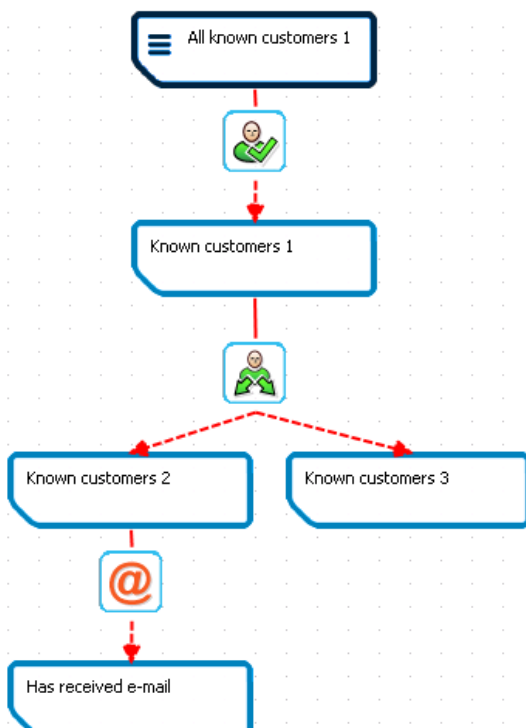
9. Click 'OK' to pass through the following two pop-up boxes. Your Dialogue should now look like this: (You may need to use the Pointer to shuffle boxes around)



10. Now it's time to add in the marketing activities for the Dialogue. For this Quick-start Guide, we will use simple eDM and DM marketing activities. First, select 'Send email' from your Toolbox (pictured right), then draw a short vertical line downwards from the 'Known customers 2' group.



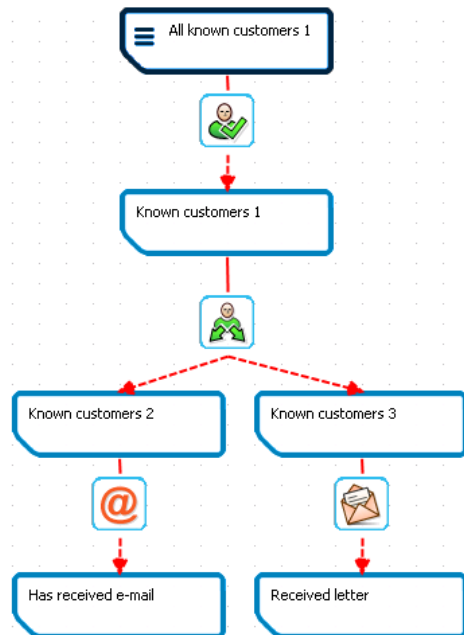
11. Click 'OK' to pass through the following two pop-up boxes. Your Dialogue should now look like this:



12. Now select 'Create letter' from your Toolbox (pictured right), then draw a short vertical line downwards from the 'Known Customers 3' group.



13. Click 'OK' to pass through the following two pop-up boxes. Your Dialogue should now look like this:



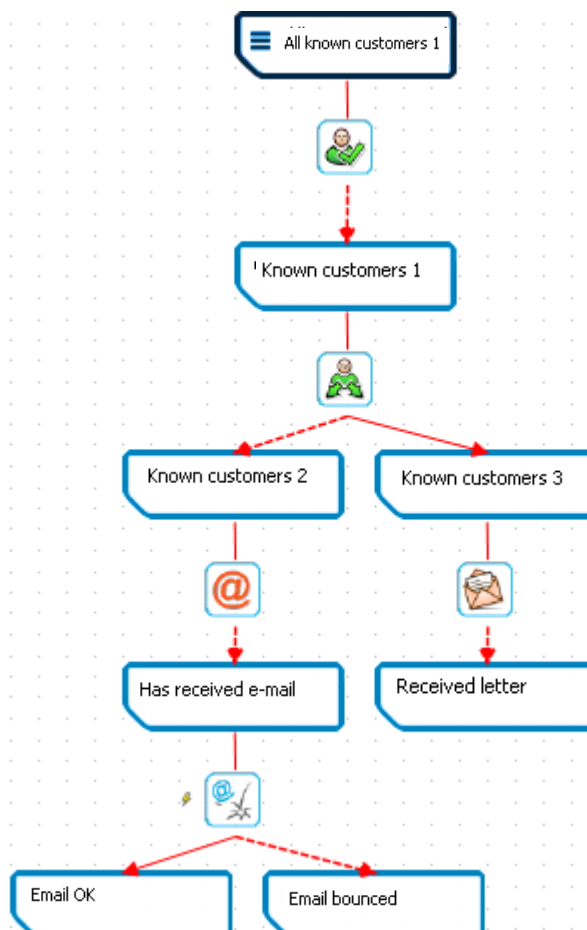
14. Select 'Check bounced email' from your Toolbox (pictured right), then draw a vertical line downwards from the 'Has received email' group.



Check bounced email

15. Click again on the 'Check bounced email' from your Toolbox and draw a diagonal line to the right from the 'Check bounced email' icon in your Dialogue.

16. Click 'OK' to pass through the following three pop-up boxes. Your Dialogue should now look like this: (You may need to use the Pointer to shuffle boxes around)

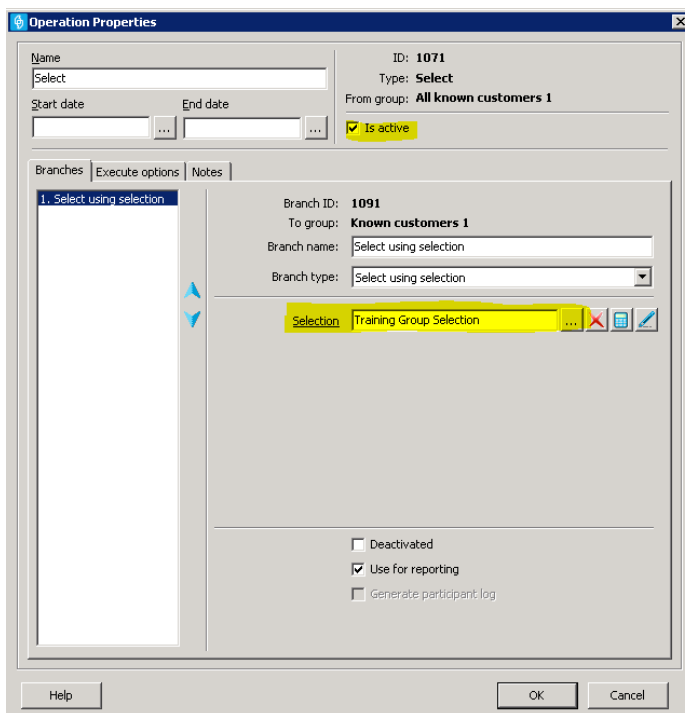


Stage 3: Tailoring your Dialogue to your chosen campaign

Now it's time to go back through all those pop-up boxes and enter the appropriate information. Simply double-click on each item to pull-up and edit its properties.

17. **'All known customers 1' group:** Leave this group as is. This is the group of all your members that the selection of members will be pulled from.

18. **'Select' icon:** First choose the Selection that you would like to use by clicking on the ellipsis next to the 'Selection' field. Choose an existing Selection file from your directory. *Note: This Quick-start Guide assumes you have already created a Selection file. Next check the box 'Is active' to ensure the operation is active and able to be executed. Click 'OK' to close. See example pictured below:

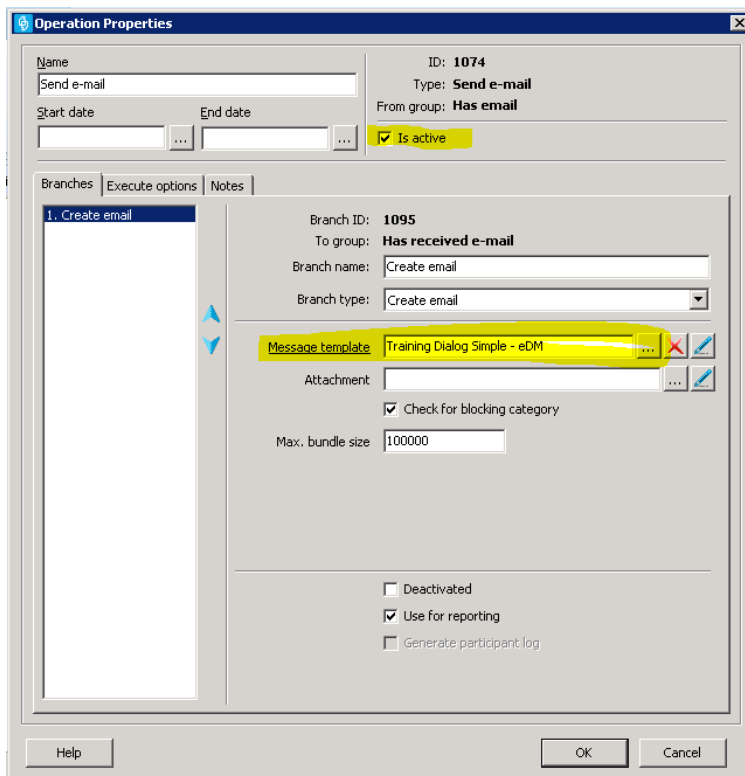


19. **'Known customers 1':** Edit the Group Name to suit the selection of members that it represents. Click 'OK' to close.

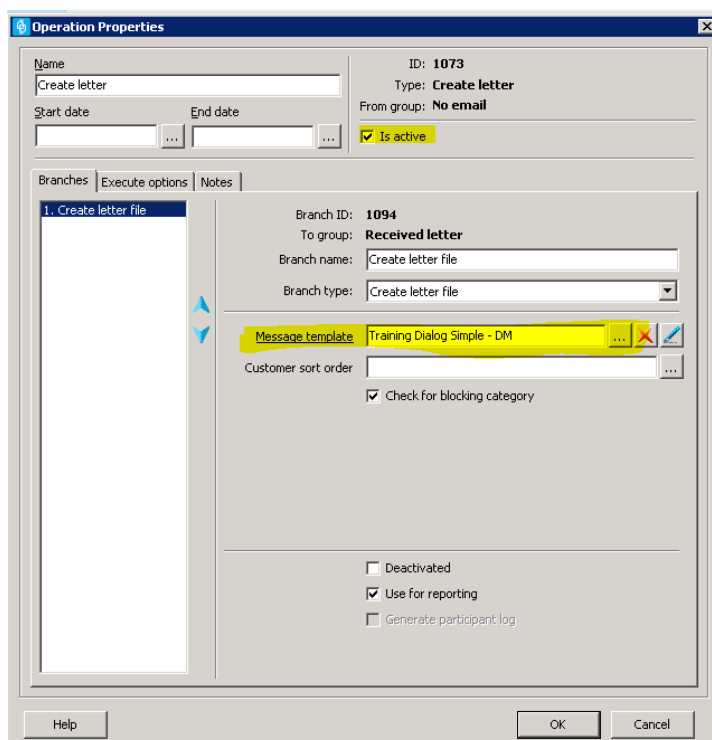
20. **'Divide' icon:** In this example and for many common Dialogues, we would like to divide the members into those that do and don't have an email address. Editing the properties of this icon will manage this.
 - a. In the Branches tab, make sure that the first branch is highlighted. It should currently be named 'Divide using selection'. Change this name to 'Has email'.
 - b. Choose a Selection file from your directory that selects members that have a registered email address. See example pictured below. *Note: This Quick-start Guide assumes you have already created a 'Has email' Selection file.

- c. Next select Branch 2, which should currently be named 'Divide using selection'. **First change the Branch Type to 'Expiry'**. You should notice this has changed the Branch Name to Expiry.
- d. Change the name from Expiry to 'No email'.
- e. Enter '0' in the 'Maximum stale days' field.
- f. Check the box 'Is active'.
- g. Click 'OK' to close. See example below:

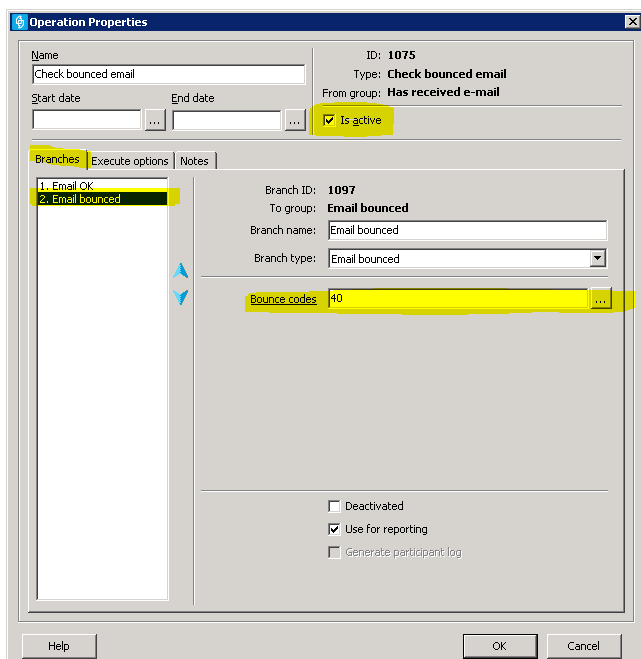
21. **'Known customers 2'**: Edit the Group Name to 'Has email'. Click 'OK' to close.
22. **'Known customers 3'**: Edit the Group Name to 'No email'. Click 'OK' to close.
23. **'Send email' icon**: First choose the Message template that you would like to use by clicking on the ellipsis next to the 'Message template' field. *Note: This Quick-start Guide assumes you have already created a Message template file. Then check the box 'Is active'. See example pictured below:



24. **'Create letter' icon**: Follow instructions as for 'Send email' icon. See example pictured below:



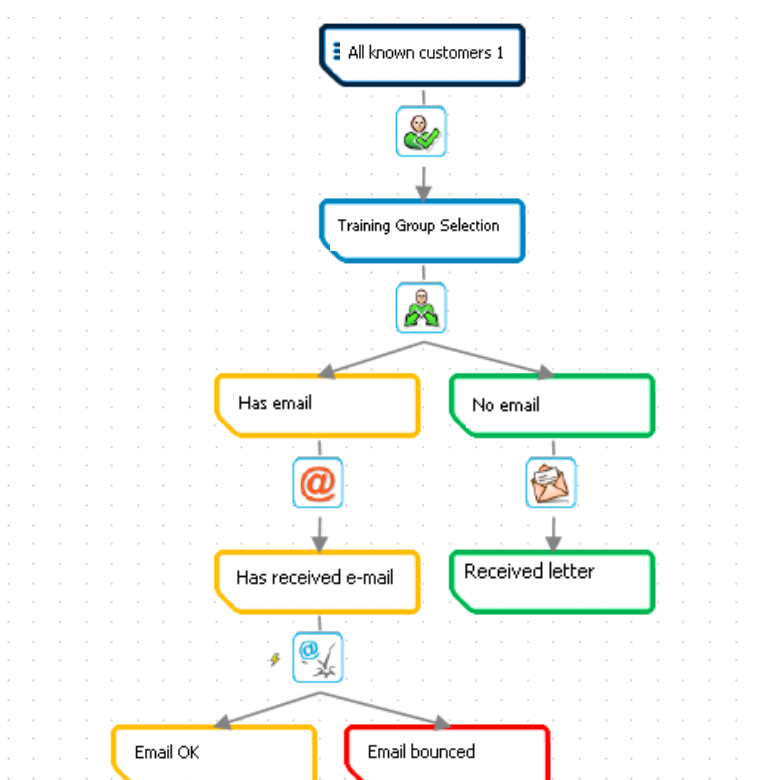
25. **'Check bounced email' icon:** Branch 1, 'Email OK' is fine to leave as is. Now click on Branch 2 – 'Email Bounced'. Select the ellipsis button next to the Bounced Codes fields and select the relevant codes. The standard selection is code 40 'General Bounce'. Click 'OK' to close. See example pictured below:



26. The settings for your new Dialogue are complete. Now you can have a play with the look and feel of your Dialogue. To edit the colour of the group rectangles or the text within them, simply right-click on the item you want to change and follow the prompts.

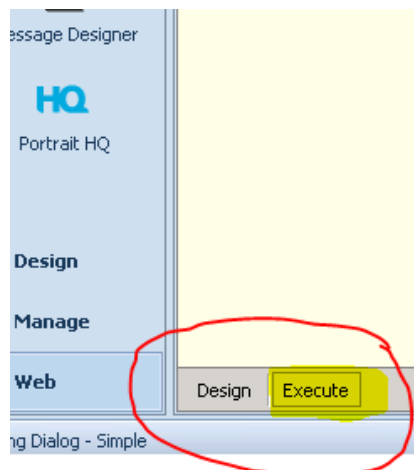
Your new Dialogue is now complete and ready to be executed!

Depending on your Selection file name and how you chose to colour your groups, it should look similar to the example below:



Stage 4: 'Execute' your new Dialogue.

27. Click on the 'Execute' tab located in the bottom left area of your page.



28. From the top of your Dialogue to the bottom, simply right-click on the Operation Type icons and select 'Execute' to start filtering your Members through the Dialogue. You will start to notice numbers of members being filtered into different groups along your Dialogue.

CONGRATULATIONS! You have now created and executed your first Dialogue. This will start you on your way to creating more complex, evolving, automated and valuable Dialogues in the future.