

*Exchange***W!se**

MESSAGING, COLLABORATION AND CRM SPECIALISTS

MX-Contact

Marketing Module Tutorial



**The complete Customer Relationship,
Contact Management
and
Sales Automation System
for
Microsoft Outlook**

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1 The MX-Contact Marketing Module Tutorial - Introduction

The Marketing Module consists of the following Items:

1. **Events**

[Tutorial Exercises - Events](#)

2. **Campaigns**

[Tutorial Exercises – Campaigns](#)

Please note the **exercises are designed to be done in sequence**, as exercises in the later sections depend on data that is added earlier in the tutorial. Also, these exercises assume that you have at least completed the exercises in section 2 of the Base System tutorial, namely Database Exercises. References are made in this tutorial to the Companies and Contacts that are added as part of those exercises.

Note that for any e-mail exercises, please set Outlook's **Mail Format** (under **Tools, Options**) to **Rich Text**, and **do not set** Microsoft Word as your E-Mail Editor.

2 Tutorial Exercises - Events

The Events Folder stores details of the Events that your company organises. This folder is for keeping details of not only major Events but also Costs attached to each Event.

In this section you will do the following exercises:

1. Adding a Event

[Error! Reference source not found.](#)

2. Adding an Event with Costs

[Adding an Event with Costs: Exercise](#)

3. Linking Contacts to an Event

[Adding an Event with Costs: Exercise](#)

4. Adding Travel and Accommodation Requirements

[Adding an Event with Costs: Exercise](#)

5. Adding a Task to an Event

[Adding an Event with Costs: Exercise](#)

6. Adding a Tasks Template

[Adding an Event with Costs: Exercise](#)

7. Using a Tasks Template with an Event

[Adding an Event with Costs: Exercise](#)

8. Using Direct Mail for an Event

[Adding an Event with Costs: Exercise](#)

Once you have done these exercises you are ready to learn about adding Campaigns.

[Tutorial Exercises – Campaigns](#)

2.1 Adding an Event: Exercise

Complete the following information:

Event Name:	Company Golf Day
Event Type:	Golf Day
Function Type:	Internal Event
Status:	Open
Venue:	Beecroft Country Club
Start Date:	1 month from today
Start Time:	07:00

Show me the **Solution** ([Adding an Event: Solution](#))

2.2 Adding an Event: Solution

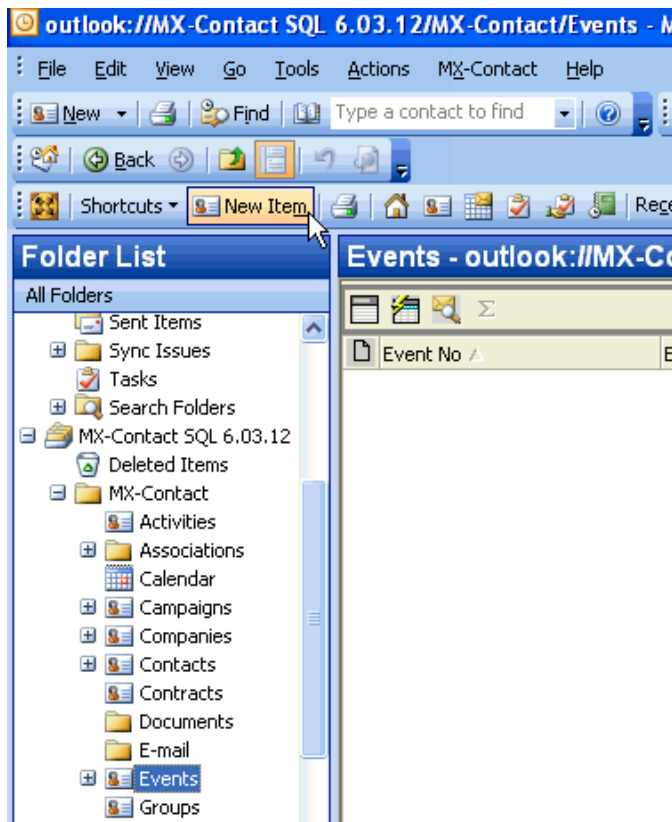
Add a Company Golf Day.

Complete the following information:

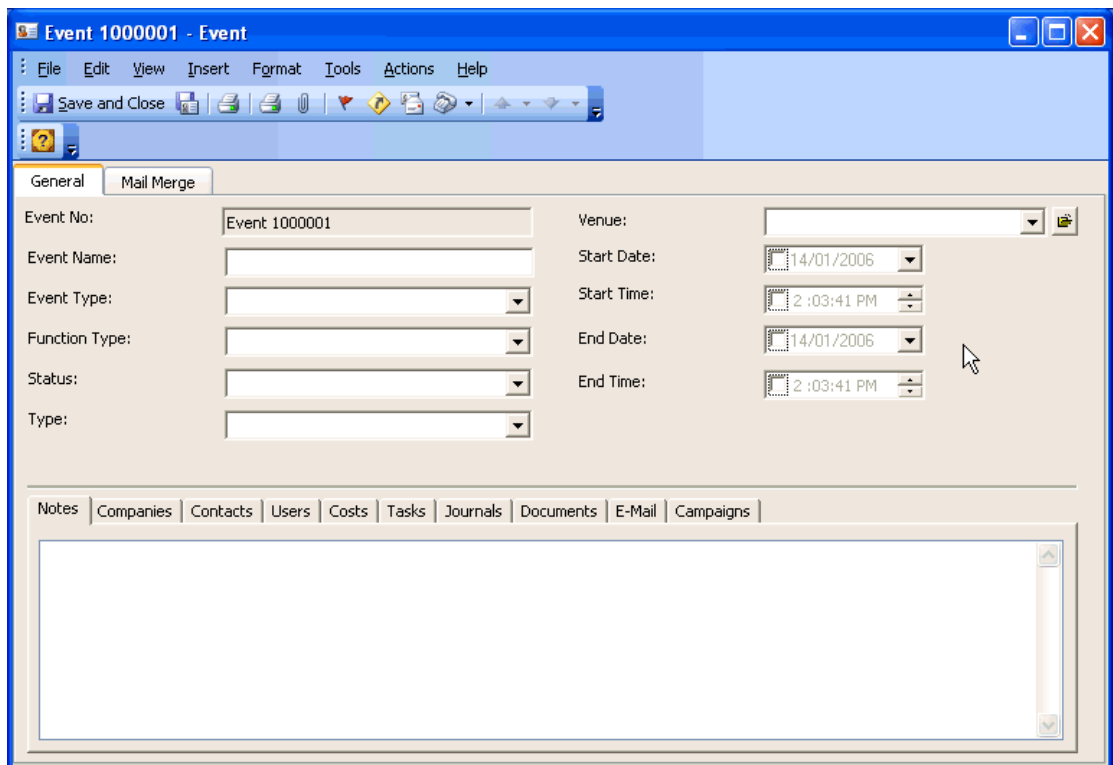
Event Name:	Company Golf Day
Event Type:	Golf Day
Function Type:	Internal Event
Status:	Open
Venue:	Beecroft Country Club
Start Date:	1 month from today
Start Time:	07:00

Basic Steps:

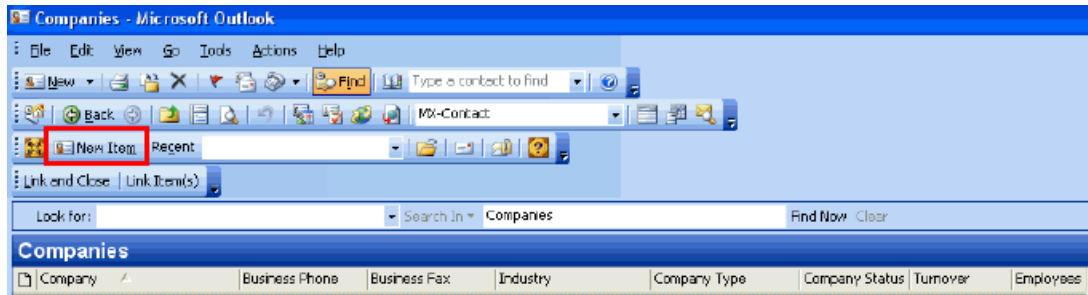
1. Click on the **Events** Folder. Click the **New Item** (Event) button on the MX-Contact Toolbar:



2. An Event Form will be displayed:



- Click on the Open Folder button attached to the field Venue. The Link Companies screen will appear. If the venue that you wish to select has not been added to your database, click on the New Item button. Add the company and click Save and Close. (This procedure must be followed for Beecroft Country Club as it will not exist on your database at this point).



- When the company appears on the Link Companies list, select it and click on Link and Close.
- Complete the Event information by recording all the relevant information. Click **Save and Close**.

Take me to the previous **Exercise** ([Error! Reference source not found.](#))

Take me to the next **Exercise** ([Adding an Event with Costs: Exercise](#))

2.3 Adding an Event with Costs: Exercise

Add the following event with costs.

Event Name:	New Product Launch Function
Event Type:	Product Launch
Function Type:	External Event
Status:	Open
Venue:	Hilton Hotel - Sydney
Start Date:	2 months from today
End Date:	2 months + 1 day from today
Start Time:	09:00
End Time:	17:00

Cost Description:	Product Brochures
Cost Type:	Brochures
Status:	Open
Supplier:	ABC Printing
Cost Centre:	Cost Centre 1
Currency:	\$
Budgeted Cost:	5,000.00
Deposit:	500.00

Show me the **Solution** ([Adding an Event with Costs: Solution](#))

2.4 Adding an Event with Costs: Solution

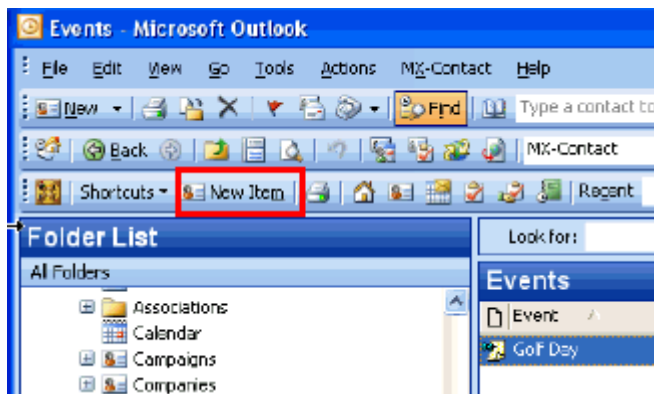
Add the following event with costs.

Event Name:	New Product Launch Function
Event Type:	Product Launch
Function Type:	External Event
Status:	Open
Venue:	Hilton Hotel - Sydney
Start Date:	2 months from today
End Date:	2 months + 1 day from today
Start Time:	09:00
End Time:	17:00

Cost Description:	Product Brochures
Cost Type:	Brochures
Status:	Open
Supplier:	ABC Printing
Cost Centre:	Cost Centre 1
Currency:	\$
Budgeted Cost:	5,000.00
Deposit:	500.00

Basic Steps:

1. Click on the **Events** Folder. Click the **New Item** (Event) button on the MX-Contact Toolbar:



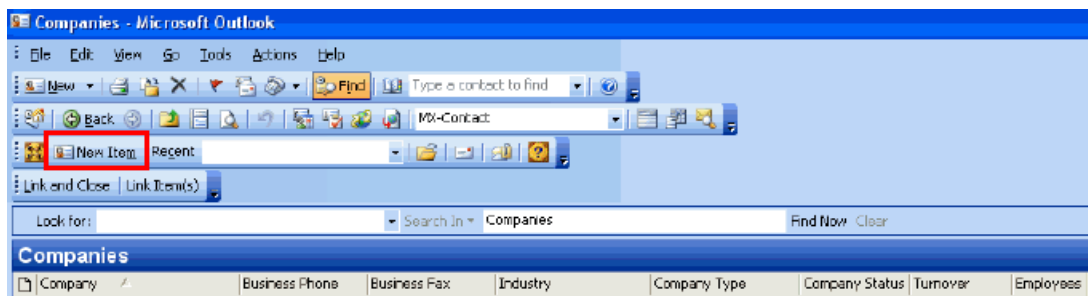
2. An Event Form will be displayed:

 A screenshot of the "Event 1000001 - Event" form in Microsoft Outlook. The title bar reads "Event 1000001 - Event". The menu bar includes File, Edit, View, Insert, Format, Tools, Actions, and Help. The toolbar contains icons for Save and Close, and other standard Outlook actions. The form is divided into two tabs: "General" (selected) and "Mail Merge". The "General" tab contains several fields:

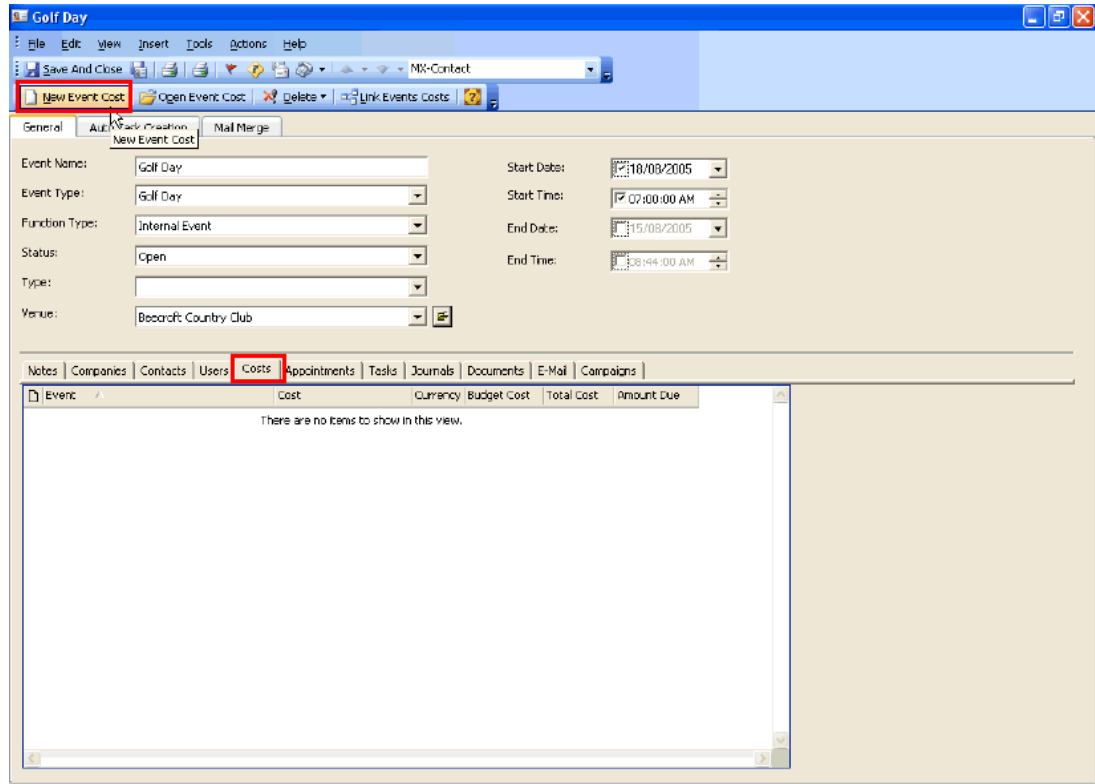
- Event No.: Text box containing "Event 1000001"
- Event Name: Empty text box
- Event Type: Dropdown menu
- Function Type: Dropdown menu
- Status: Dropdown menu
- Type: Dropdown menu
- Venue: Dropdown menu
- Start Date: Date picker showing "14/01/2006"
- Start Time: Time picker showing "2 :03:41 PM"
- End Date: Date picker showing "14/01/2006"
- End Time: Time picker showing "2 :03:41 PM"

 Below these fields is a horizontal tab bar with options: Notes, Companies, Contacts, Users, Costs, Tasks, Journals, Documents, E-Mail, and Campaigns. The "Notes" tab is selected, and a large empty text area is visible below it.

3. Click on the Open Folder button attached to the field Venue. The Link Companies screen will appear. If the venue that you wish to select has not been added to your database, click on the New Item button. Add the company and click Save and Close. (This procedure must be followed for Hilton Hotel Sydney as it will not exist on your database at this point).



- When the company appears on the Link Companies list, select it and click on Link and Close.
- Complete the Event information by recording all the relevant information.
- Click on the Costs Tab and then on the New Event Cost button.



- An Event Cost screen will appear:

The screenshot shows the 'Event Cost' form with the following data:

Event:	Event 1000002	Cost Type:	
Cost Description:		Status:	
Supplier:		Order Date:	14/01/2006
Supplier Contact:		P/O Number:	
Internal Contact:		Invoice Number:	
Cost Centre:			

Cost Details		Cancellation Details	
Currency:		Cancellation Date:	14/01/2006
Budgeted Cost:	0.00	Cancellation Fee:	0.00
Actual Cost:	0.00	Refund:	0.00
Deposit:	0.00		
Additional Payment:	0.00		
Amount Paid:	0.00		
Outstanding Balance:	0.00		
	Deposit Due Date: 14/01/2006		
	O/B Due Date: 14/01/2006		

8. Enter all the relevant information.
9. Click on the Open Folder button attached to the field Supplier. The Link Companies screen will appear. If the company that you wish to select has not been added to your database, click on the New Item button. Add the company and click Save and Close. (This procedure must be followed for ABC Printing as it will not exist on your database at this point).
10. Add all the relevant information and click **Save and Close**.

Take me back to the Exercise ([Adding an Event with Costs: Exercise](#))

Take me to the next Exercise ([Linking Contacts to an Event: Exercise](#))

2.5 Linking Contacts to an Event: Exercise

Link the following delegates to the New Product Launch.

Event Name:	New Product Launch Function
Delegate:	Barney Anderson
Delegate:	Jim Bothwell
Delegate:	Johnny Walker

Show me the **Solution** ([Linking Contacts to an Event: Solution](#))

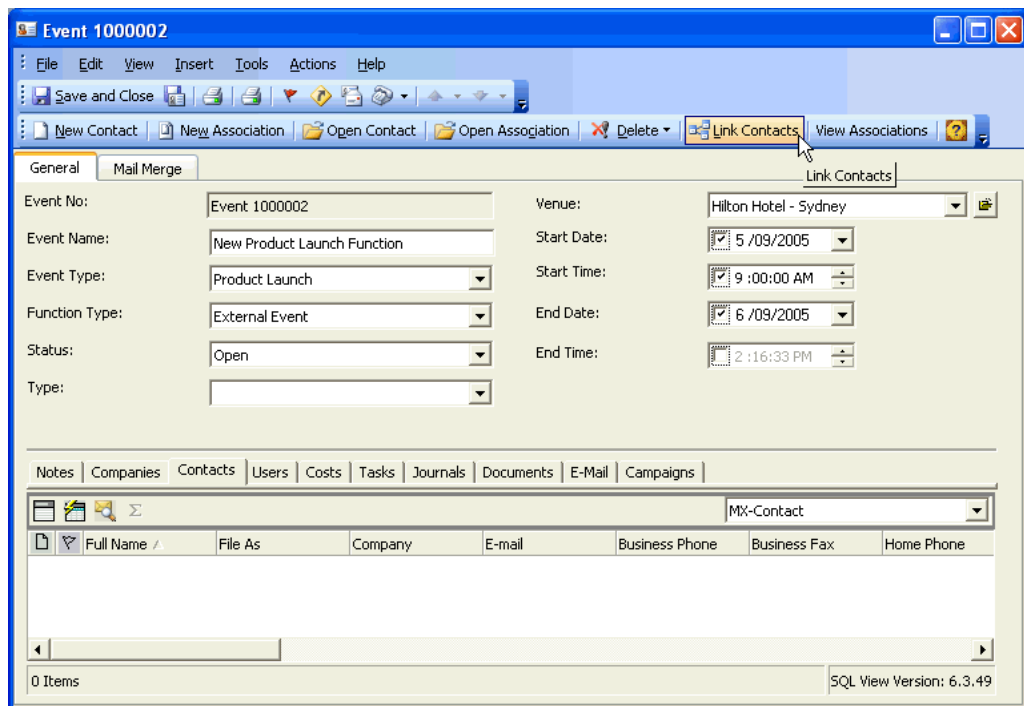
2.6 Linking Contacts to an Event: Solution

Link the following delegates to the New Product Launch.

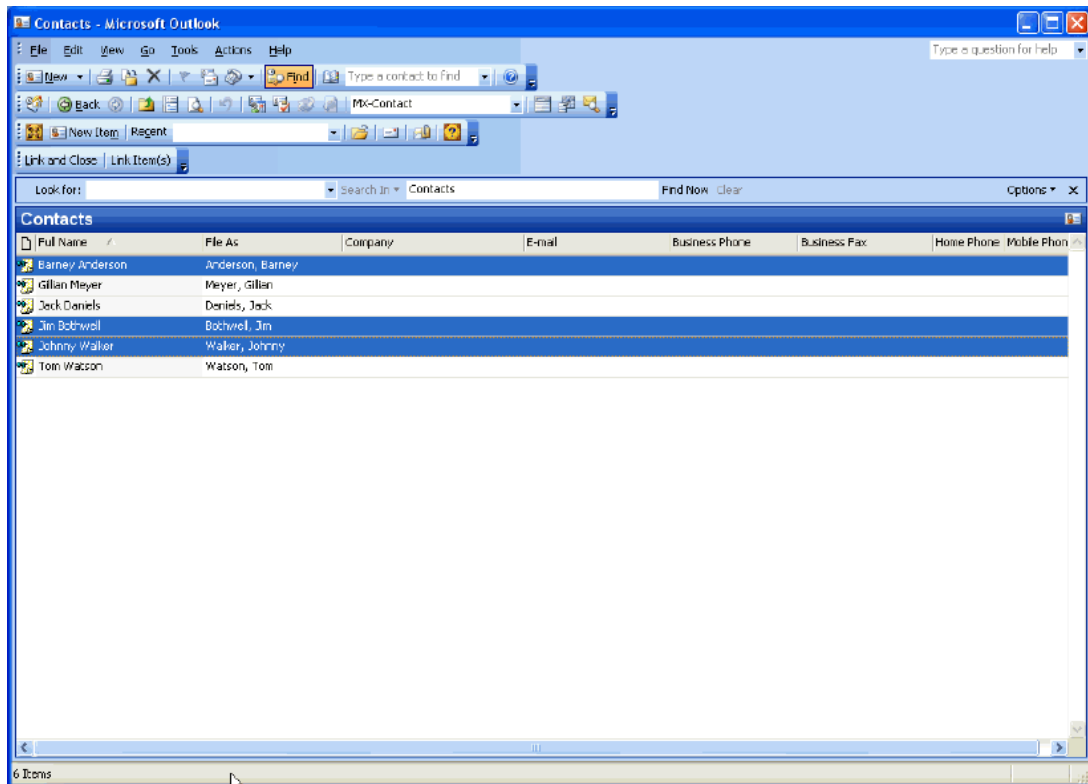
Event Name:	New Product Launch Function
Delegate:	Barney Anderson
Delegate:	Jim Bothwell
Delegate:	Johnny Walker

Basic Steps:

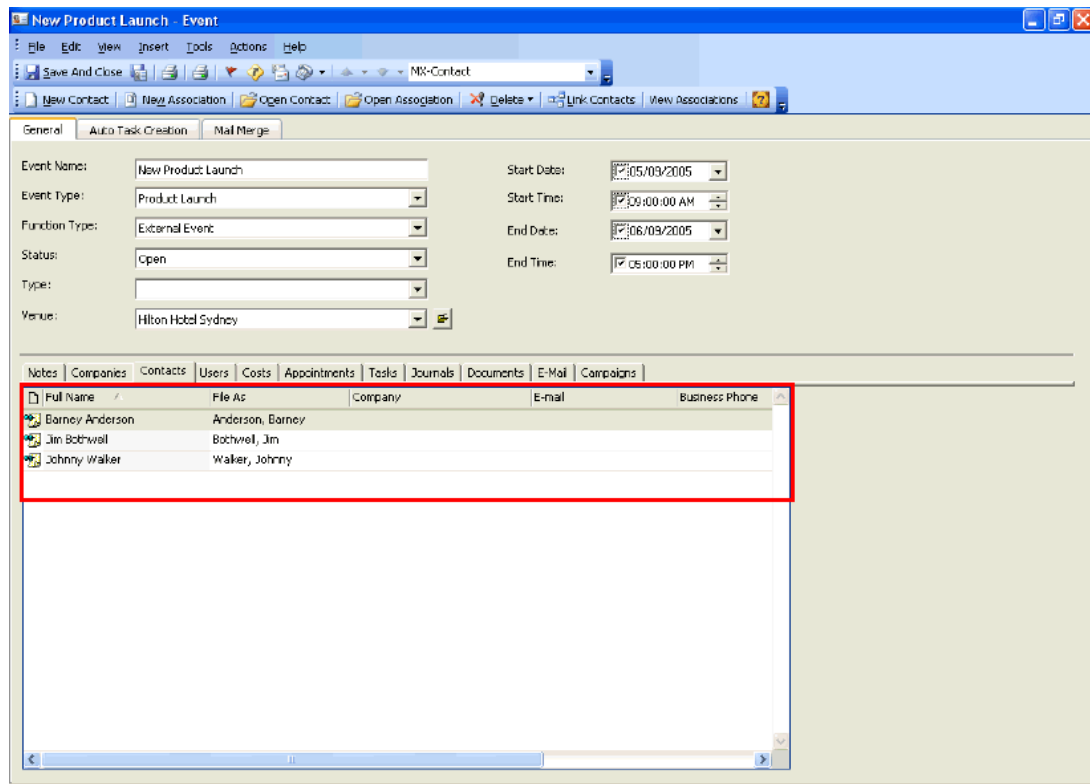
1. Click on the Events folder and select the New Product Launch Event.



2. Click on the Contacts Tab and then on the Link Contacts button.



- Hold the Ctrl button and select all the relevant Contacts. Click on Link and Close. These contacts will now appear on the contacts tab for this event.



4. Click Save and Close.

Take me back to the Exercise ([Linking Contacts to an Event: Exercise](#))

Take me to the next Exercise ([Adding Travel and Accommodation Requirements: Exercise](#))

2.7 Adding Travel and Accommodation Requirements: Exercise

Barney Anderson has asked you to organise travel and accommodation for him for the Product Launch. Enter the following details:

Event Name:	New Product Launch Function
Delegate:	Barney Anderson
Mode of Transport:	Air
Arrival Date:	2 months -1 day from today
Departure Date:	2 months + 1 day from today
Accommodation Venue:	Hilton Hotel Sydney
Arrival Date:	2 months -1 day from today
Departure Date:	2 months + 1 day from today

Payment Method:	Credit Card
Card Type:	Visa
Card Number:	2225 1114 6669 2121
Expiry Date:	04/09

Show me the **Solution** ([Adding Travel and Accommodation Requirements: Solution](#))

2.8 Adding Travel and Accommodation Requirements: Solution

Barney Anderson has asked you to organise travel and accommodation for him for the Product Launch. Enter the following details:

Event Name:	New Product Launch Function
Delegate:	Barney Anderson
Mode of Transport:	Air
Arrival Date:	2 months -1 day from today
Departure Date:	2 months + 1 day from today
Accommodation Venue:	Hilton Hotel Sydney
Arrival Date:	2 months -1 day from today
Departure Date:	2 months + 1 day from today

Payment Method:	Credit Card
Card Type:	Visa
Card Number:	2225 1114 6669 2121
Expiry Date:	04/09

Basic Steps:

1. Click on the Events folder and select the New Product Launch Event.
2. Click on the Contacts Tab and then select Barney Anderson.
3. Click on the Open Association button and then on the Travel & Accommodation Tab.

Event 1000002 / Barney Anderson

File Edit View Insert Tools Actions Help

Save and Close

General Travel & Accommodation Payment Details

Event: Event 1000002 Contact: Barney Anderson

Travel Arrangements:

Mode of Transport: [Dropdown]

Arrival Date: 14/01/2006

Departure Date: 14/01/2006

Car Hire:

Hire Company: [Dropdown]

Other Details: [Text Area]

Transport Details

Date: None None

Travel Code: [Text]

Departure Time: 2 :21:34 PM 2 :21:34 PM

Arrival Time: 2 :21:34 PM 2 :21:34 PM

Accommodation Details:

Venue: [Dropdown]

Arrival Date: 14/01/2006

Departure Date: 14/01/2006

Room No: [Text]

Room Type: [Dropdown]

Sharing With: [Dropdown]

Dietary Requirements: [Dropdown]

Special Requirements: [Text Area]

4. Enter all the relevant details.
5. Click on the Payment Details tab.

Event 1000002 / Barney Anderson

File Edit View Insert Tools Actions Help

Save and Close

General Travel & Accommodation Payment Details

Event: Event 1000002 Contact: Barney Anderson

Payment Method: Credit Card

Card Type: VISA

Number: 2225 1114 6669 2121

Expiry Date: 1 /04/2007

Currency: [Dropdown]

Amount Due: 0.00

Amount Paid: 0.00

Balance: 0.00

6. Enter the following details:

Payment Method:	XJRT500 New Product Launch
Card Type:	Barney Anderson
Card Number:	2225 1114 6669 2121
Expiry Date:	04/07

7. Click Save and Close.

Take me back to the Exercise ([Adding Travel and Accommodation Requirements: Exercise](#))

Take me to the next Exercise ([Adding Tasks to an Event: Exercise](#))

2.9 Adding Tasks to an Event: Exercise

Add a task to remind you to send the airline tickets to Barney Anderson.

Event Name:	New Product Launch Function
Contact:	Barney Anderson
Subject:	Send Airline tickets to Barney Anderson
Due Date:	1 month + 2 weeks from today
Reminder:	Day before due date
Notes:	Send airline tickets to Barney Anderson for New Product Launch event.

Show me the **Solution** ([Adding Tasks to an Event: Solution](#))

2.10 Adding Tasks to an Event: Solution

Add a task to remind you to send the airline tickets to Barney Anderson.

Event Name:	New Product Launch Function
Contact:	Barney Anderson
Subject:	Send Airline tickets to Barney Anderson
Due Date:	1 month + 2 weeks from today
Reminder:	Day before due date
Notes:	Send airline tickets to Barney Anderson for New Product Launch event.

Basic Steps:

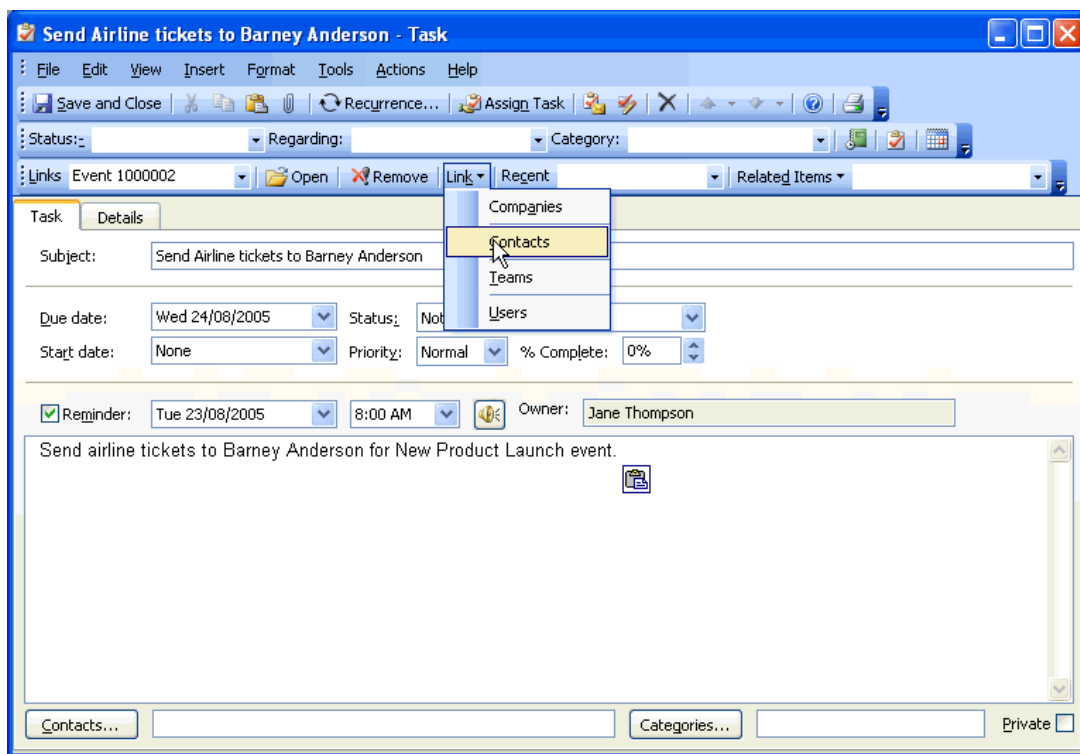
1. Click on the Events folder and select the New Product Launch Event.
2. Click on the Tasks Tab and then on the New Item button. A task form will open.
3. Enter the relevant details.

The screenshot shows the 'Untitled - Task' window in Microsoft Exchange. The interface includes a menu bar (File, Edit, View, Insert, Format, Tools, Actions, Help) and a toolbar with various task management icons. The main form area contains the following fields and controls:

- Subject:** An empty text input field.
- Due date:** A dropdown menu set to 'None'.
- Start date:** A dropdown menu set to 'None'.
- Status:** A dropdown menu set to 'Not Started'.
- Priority:** A dropdown menu set to 'Normal'.
- % Complete:** A spinner control set to '0%'.
- Reminder:** A dropdown menu set to 'None'.
- Owner:** A text field containing 'Jane Thompson'.

At the bottom of the window, there are buttons for 'Contacts...', 'Categories...', and a 'Private' checkbox.

- Link Barney Anderson to this task by clicking on the Link button and then on Contacts.



- The Contacts list will appear. Select Barney Anderson and click on Link and Close.
- Click on Save and Close.

Take me back to the Exercise ([Adding Tasks to an Event: Exercise](#))

Take me to the next Exercise ([Adding a Task Template: Exercise](#))

2.11 Adding a Task Template: Exercise

Add the following Task Template.

Template Name:	Function Template
Folder:	Events

Task Description:	Book Venue
Number of Days:	0
Calculate Days from:	Start Date
Preceding Task:	None

Task Description:	Book Catering
Number of Days:	3
Calculate Days from:	Preceding Task
Preceding Task:	Book Venue

Show me the **Solution** ([Adding a Task Template: Solution](#))

2.12 Adding a Task Template: Solution

Add the following Task Template.

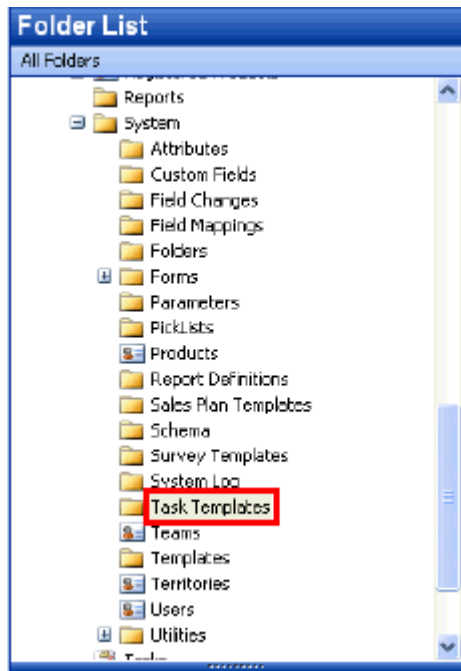
Template Name:	Function Template
Folder:	Events

Task Description:	Book Venue
Number of Days:	0
Calculate Days from:	Start Date
Preceding Task:	None

Task Description:	Book Catering
Number of Days:	3
Calculate Days from:	Preceding Task
Preceding Task:	Book Venue

Basic Steps:

1. Click on the System folder and select the Task Template sub-folder.



2. Click on the New Item button. A task template form will open.

A screenshot of a 'Task 00001 - Task Template' form. The form has a menu bar (File, Edit, View, Insert, Tools, Actions, Help) and a toolbar with icons for Save, Print, Copy, Paste, Undo, Redo, and Help. The form fields are: Task Template No.: Task 00001; Folder: (dropdown); Template Name: (dropdown); Task Category: (dropdown); Task Regarding: (dropdown); Task Description: (text area); Number of Days: 0; Calculate Days From: Start Date (selected) and Preceding Task (unselected); Preceding Task: (dropdown).

3. Enter the relevant details.
4. Select the Events Folder in order to attach this template to Events.
5. Type in Function Template in the Template Name field. The name only has to be typed in the first time something is added to this template. The next time something is added

to this template, you will be able to select the template name from the drop down list attached to this field.

6. One Task Description is added at a time. When the first one has been added, click on Save and Close.
7. Click on the New Item button in the Tasks Template sub-folder to start adding the second task description to the template.
8. Repeat the process until all the task descriptions have been added to a particular task template.

Take me back to the Exercise ([Adding a Task Template: Exercise](#))

Take me to the next Exercise ([Using a Task Template with an Event: Exercise](#))

2.13 Using a Task Template with an Event: Exercise

Use the following Task Template.

Event:	Product Launch Function
Template Name:	Function Template

Show me the **Solution** ([Using a Task Template with an Event: Solution](#))

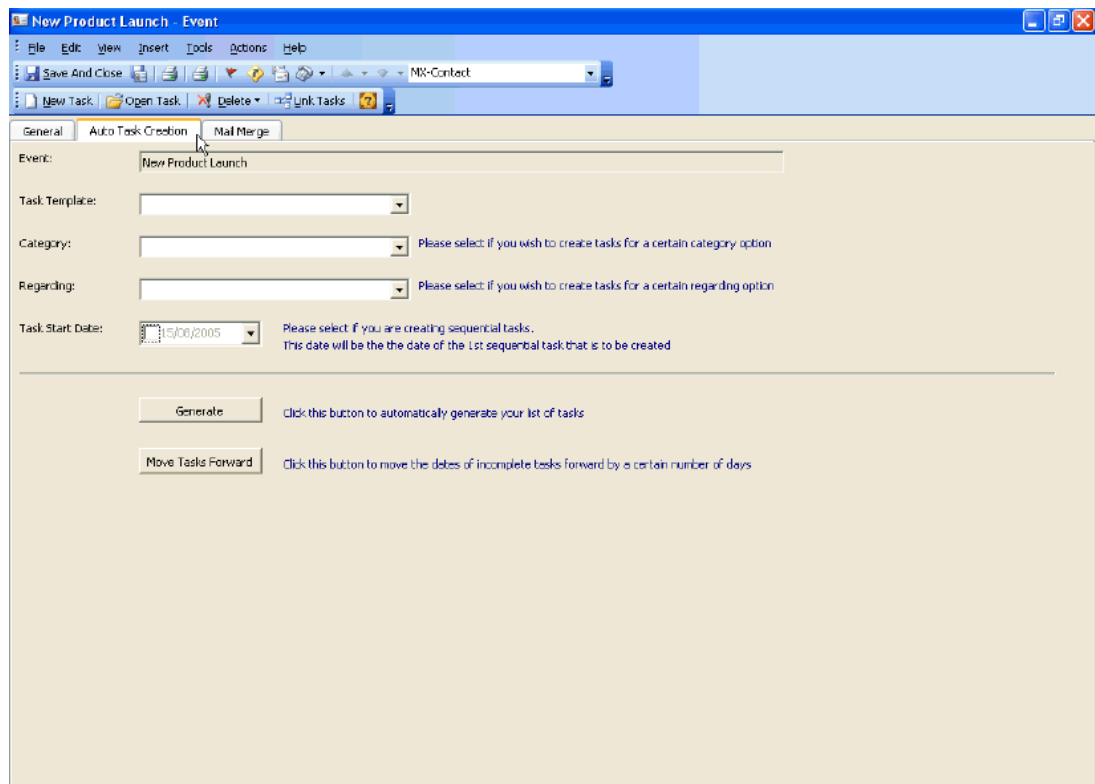
2.14 Using a Task Template with an Event: Solution

Add the following Task Template.

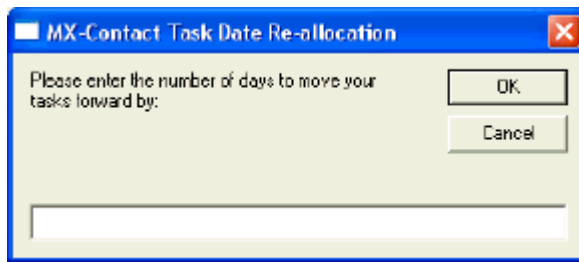
Event:	Product Launch Function
Template Name:	Function Template

Basic Steps:

1. Click on the Events folder and select the New Product Launch Event.
2. Click on the Tasks Tab and then on the Auto Task Creation tab.



3. Select Function Template in the task Template field.
4. Select a Task Start Date.
5. Click on the Generate button. A task will be generated for each task description in that particular Task Template.
6. If the first task is delayed for any reason, you can use the Move Task Forward button to move all tasks generated from this template forward by a specified number of days.



7. Enter the number of days and click on OK.
8. Click on the General tab. The tasks that have been automatically created will be visible on the Tasks Tab for this Event.
9. Click Save and Close.

Take me back to the Exercise ([Using a Task Template with an Event: Exercise](#))

Take me to the next Exercise ([Using Direct Mail for Events: Exercise](#))

2.15 Using Direct Mail for Events: Exercise

Send an invitation to all the golfers inviting them to the Company Golf Day.

Event Name:	Company Golf Day
Group:	MX-Golfers
Report Name:	Event Report with Related Contacts for Export
File Format:	Excel 8.0 Tabular (30)
File Path/ Name:	C:\Program Files\MXContact\Event Contacts.xls
Template Name:	MXContact_MailMerge_Events_Excel_Data.dot

Show me the **Solution** ([Using Direct Mail for Events: Solution](#))

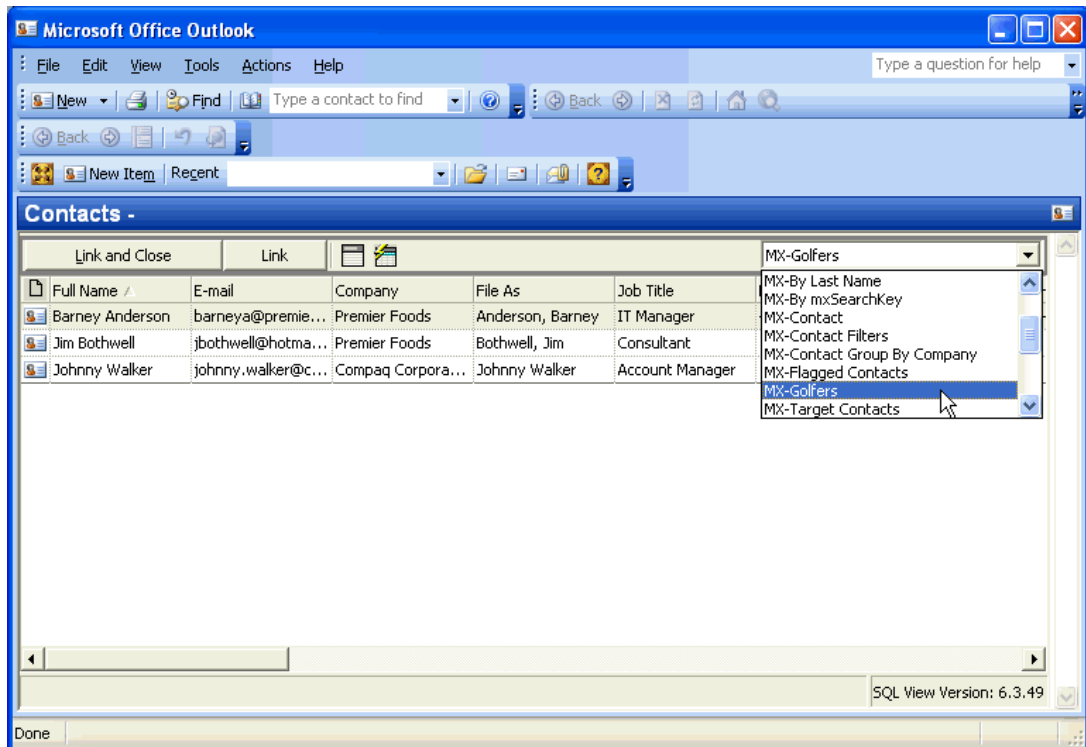
2.16 Using Direct Mail for Events: Solution

Send an invitation to all the golfers inviting them to the Company Golf Day.

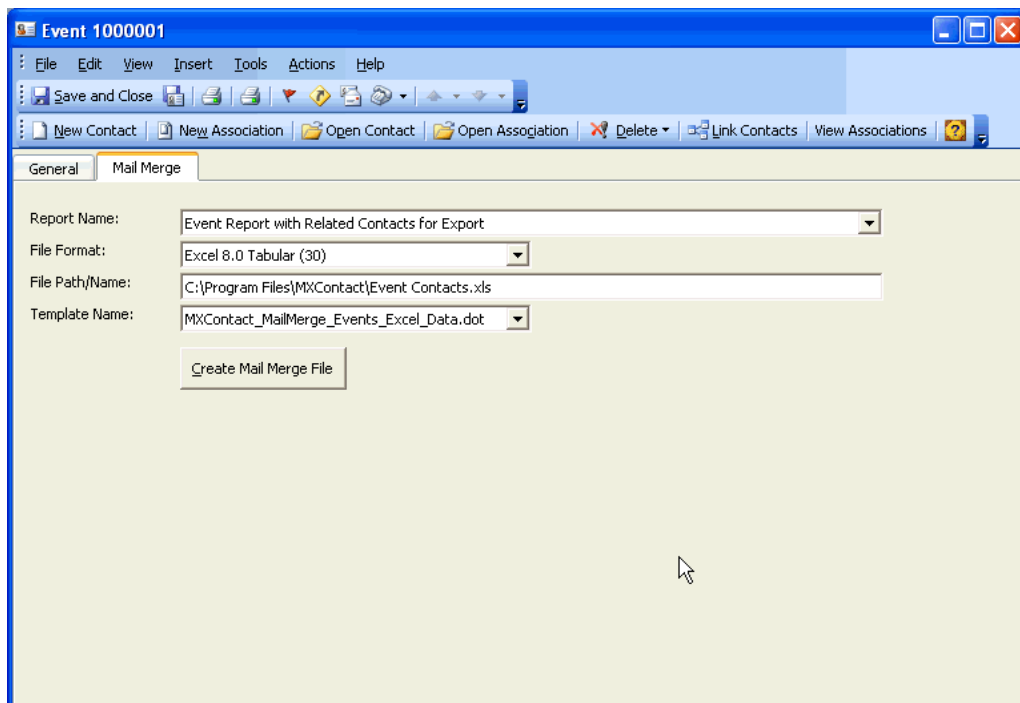
Event Name:	Company Golf Day
Group:	MX-Golfers
Report Name:	Event Report with Related Contacts for Export
File Format:	Excel 8.0 Tabular (30)
File Path/ Name:	C:\Program Files\MXContact\Event Contacts.xls
Template Name:	MXContact_MailMerge_Events_Excel_Data.dot

Basic Steps:

1. In order to complete the following exercise, you will need to open the contact records for Barney Anderson, Jim Bothwell and Johnny Walker and mark Golf as an interest on each of their profiles tabs.
2. Click on the Events folder and select the Golf Day Event.
3. Select the Contacts tab and click on the Link Contacts button.
4. Select the MX-Golfers View from the Current View field.

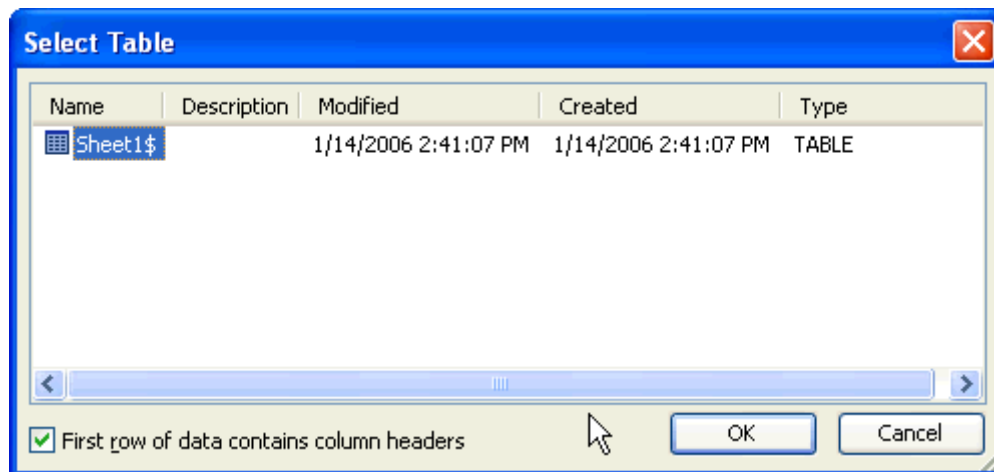


5. Highlight all the Contacts and click Link and Close. These Contacts will now appear on the Contacts Tab for this event.
6. Click on the Mail Merge tab.

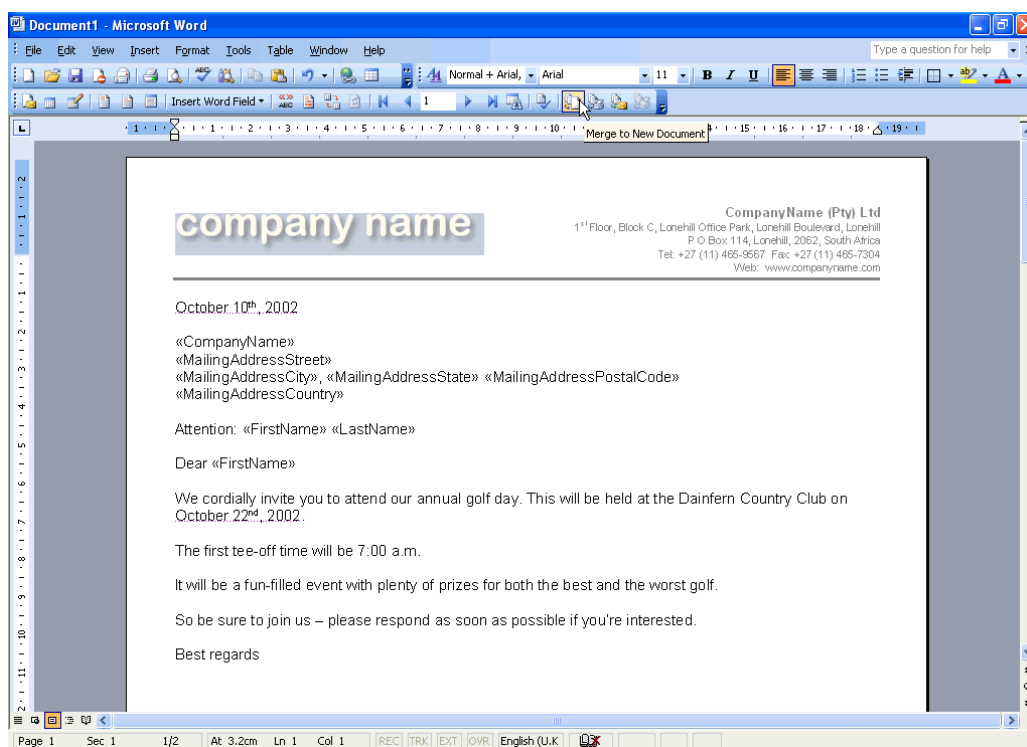


7. Select the Report Name Event Report with Related Contacts for Export.

8. Select the Excel 8.0 Tabular (30) File Format.
9. Select the Template MXContact_MailMerge_Events_Excel_Data.dot.
10. Click on the Create Mail Merge File button. When the Select Table screen appears, click on OK.



11. The Merge Document will appear. Click on the Merge to New Document button.



12. The document will be merged with each Contact linked to this event. You can send these documents straight to the printer or E-mail them by clicking on the Merge to Printer button or Merge to E-mail button instead of the Merge to Document button.
13. Close the documents.

Take me back to the Exercise ([Using Direct Mail for Events: Exercise](#))

Take me to the next Exercise ([Tutorial Exercises – Campaigns](#))

3 Tutorial Exercises – Campaigns

In this section you will do the following exercises:

1. **Adding a Campaign**

[Adding a Campaign: Exercise](#)

2. **Adding a Campaign with Costs**

[Adding Campaign Costs: Exercise](#)

3. **Linking Contacts to a Campaign**

[Linking Contacts to a Campaign: Exercise](#)

4. **Using Direct Mail with Campaigns**

[Using Direct Mail for Campaigns: Exercise](#)

Once you have done these exercises you are ready to learn about adding Surveys to companies and contacts. ([Error! Reference source not found.](#))

3.1 Adding a Campaign: Exercise

Add the following Campaign details:

Campaign Name:	HP Pavilion Notebook Promotion
Description:	Special Offer and Free Give Away with HP Pavilion Notebooks
Family:	Promotion
Type:	E-mail
Product Code:	Zv5022AP
Product Description:	HP Pavilion Notebook
Start Date:	1 month from today
End Date:	2 months from today
Launch Date:	2 weeks from today

Show me the **Solution** ([Adding a Campaign: Solution](#))

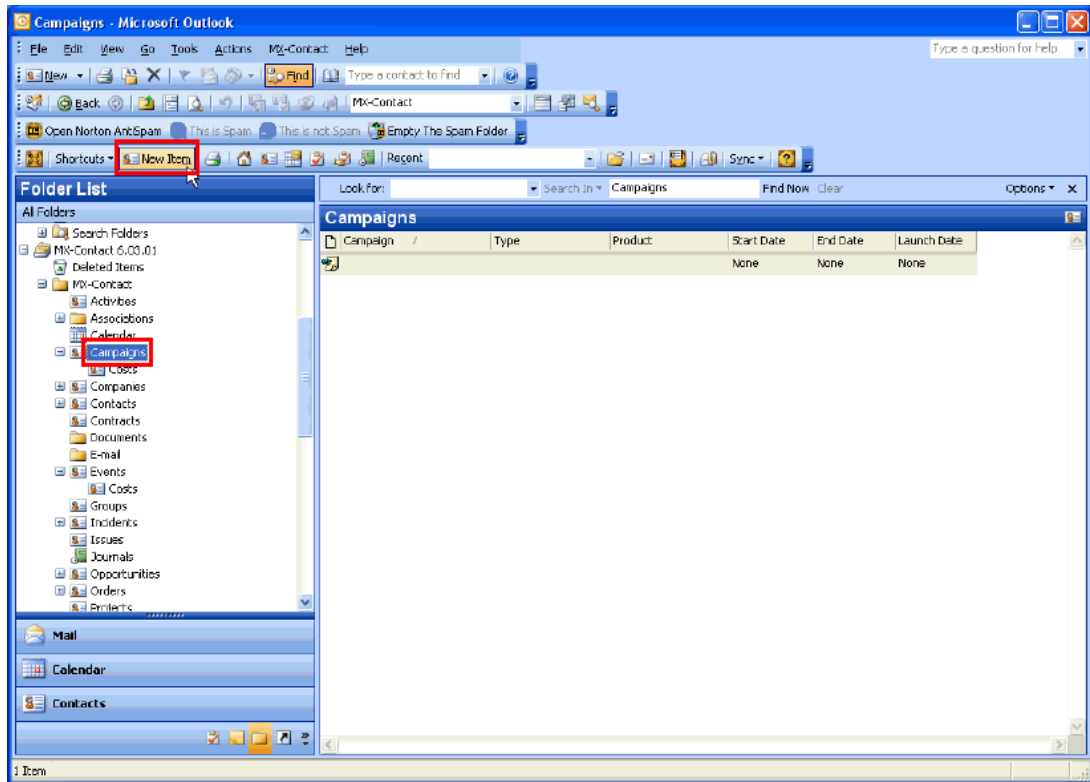
3.2 Adding a Campaign: Solution

Add the following Campaign details:

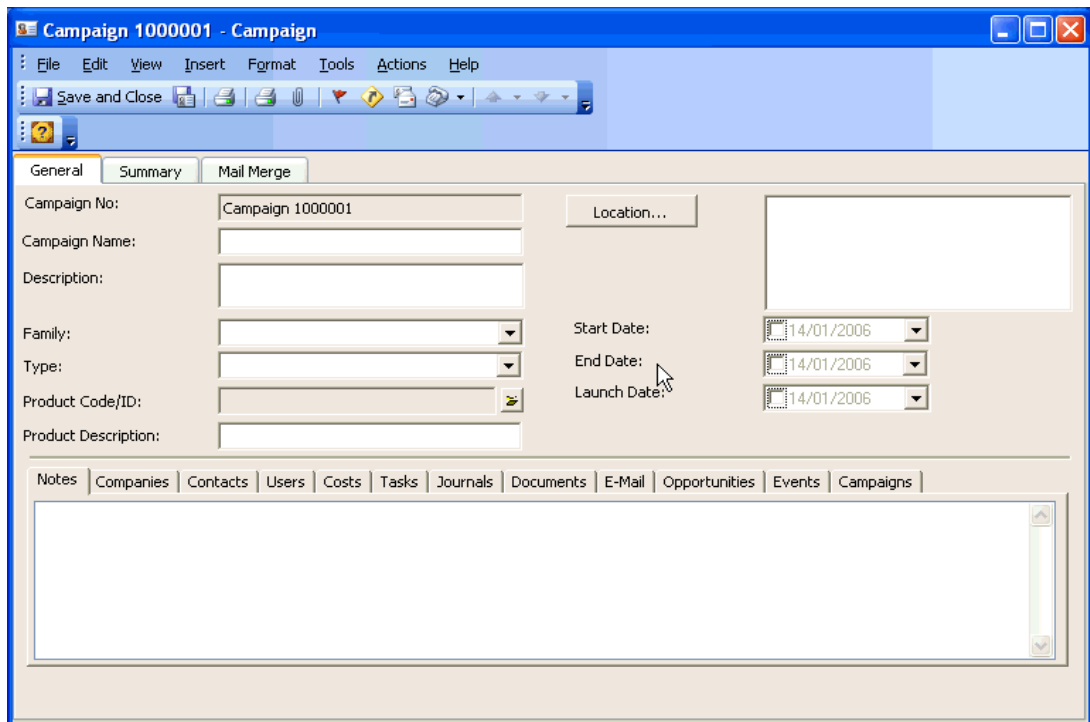
Campaign Name:	HP Pavilion Notebook Promotion
Description:	Special Offer and Free Give Away with HP Pavilion Notebooks
Family:	Promotion
Type:	E-mail
Product Code:	Zv5022AP
Product Description:	HP Pavilion Notebook
Start Date:	1 month from today
End Date:	2 months from today
Launch Date:	2 weeks from today

Basic Steps:

1. Click on the **Campaigns** Folder. Click the **New Item** (Campaign) button on the MX-Contact Toolbar:



2. An Campaign Form will be displayed:



3. Enter the Campaign details.

Click on the Open Folder button attached to the Product field. The Product List will appear.

4. Select the correct product and click on Link and Close.
5. Complete the Campaign information and click **Save and Close**.

Take me to the previous **Exercise** ([Adding a Campaign: Exercise](#))

Take me to the next **Exercise** ([Adding Campaign Costs: Exercise](#))

3.3 Adding Campaign Costs: Exercise

Add the following event with costs.

Campaign Name:	HP Pavilion Notebook Promotion
-----------------------	---------------------------------------

Cost Description:	Promotion Brochure for Attachment with E-mail
Cost Type:	Advertising
Status:	Open
Supplier:	ABC Printing
Cost Centre:	Cost Centre 1
Currency:	\$
Budgeted Cost:	3,000.00
Deposit:	300.00

Show me the **Solution** ([Adding Campaign Costs: Solution](#))

3.4 Adding Campaign Costs: Solution

Add the following event with costs.

Campaign Name:	HP Pavilion Notebook Promotion
-----------------------	---------------------------------------

Cost Description:	Promotion Brochure for Attachment with E-mail
Cost Type:	Advertising
Status:	Open
Supplier:	ABC Printing
Cost Centre:	Cost Centre 1
Currency:	\$
Budgeted Cost:	3,000.00
Deposit:	300.00

Basic Steps:

1. Click on the **Campaigns** Folder. Select the HP Pavilion Notebook Promotion.
2. Click on the Costs Tab and then on the New Campaign Costs button.
3. A Campaign Cost screen will appear:

The screenshot shows a software window titled "Campaign Cost" with a menu bar (File, Edit, View, Insert, Tools, Actions, Help) and a toolbar. The main area contains several sections:

- General Information:** Campaign: Campaign 1000001, Cost Type: [dropdown], Cost Description: [text], Status: [dropdown].
- Supplier Information:** Supplier: [text with folder icon], Supplier Contact: [text with folder icon], Internal Contact: [text with folder icon], Cost Centre: [dropdown].
- Order Information:** Order Date: 14/01/2006 [dropdown], P/O Number: [text], Invoice Number: [text].
- Cost Details:**
 - Currency: [dropdown]
 - Budgeted Cost: [text] 0.00
 - Total Cost: [text] 0.00
 - Deposit: [text] 0.00, Deposit Due Date: 14/01/2006 [dropdown]
 - Additional Payment: [text] 0.00
 - Amount Paid: [text] 0.00, O/B Due Date: [dropdown]
 - Outstanding Balance: [text] 0.00
- Cancellation Details:**
 - Cancellation Date: 14/01/2006 [dropdown]
 - Cancellation Fee: [text] 0.00
 - Refund: [text] 0.00

4. Enter all the relevant information.
5. Click on the Open Folder button attached to the field Supplier. The Link Companies screen will appear. Select ABC Printing and click on Link and Close.
6. Add all the relevant information and click **Save and Close**.

Take me back to the Exercise ([Adding Campaign Costs: Exercise](#))

Take me to the next Exercise ([Linking Contacts to a Campaign: Exercise](#))

3.5 Linking Contacts to a Campaign: Exercise

Link the following Contacts to the HP Product Promotion.

Campaign Name:	HP Pavilion Notebook Promotion
Contact:	Barney Anderson
Contact:	Gillian Meyer
Contact:	Jim Bothwell

Show me the **Solution** ([Linking Contacts to a Campaign: Solution](#))

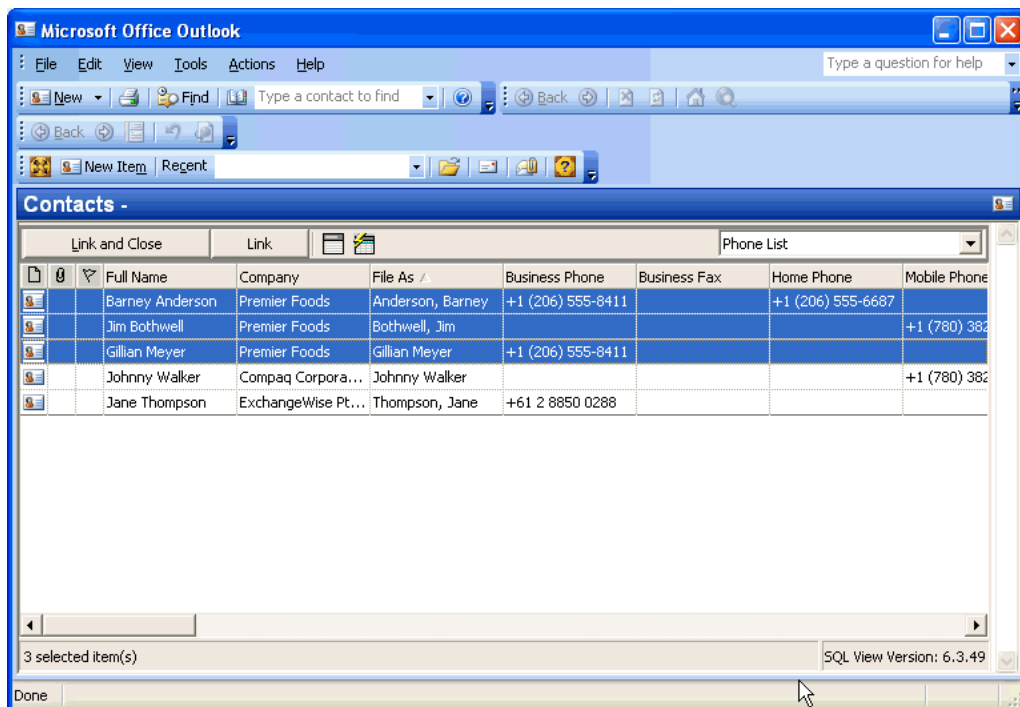
3.6 Linking Contacts to a Campaign: Solution

Link the following Contacts to the HP Pavilion Notebook Promotion.

Campaign Name:	HP Pavilion Notebook Promotion
Contact:	Barney Anderson
Contact:	Gillian Meyer
Contact:	Jim Bothwell

Basic Steps:

1. Click on the Campaigns folder and select the HP Pavilion Notebook Promotion.
2. Click on the Contacts Tab and then on the Link Contacts button.



3. Hold the Ctrl button and select all the relevant Contacts. Click on Link and Close. These contacts will now appear on the contacts tab for this Campaign.

The screenshot displays the '1000001, Campaign' window in MX-Contact. The 'General' tab is active, showing the following details:

- Campaign No: Campaign 1000001
- Campaign Name: HP Pavilion Notebook Promotion
- Description: Special Offer and Free Give Away with HP Pavilion
- Family: Promotion
- Type: E-Mail
- Product Code/ID: Zv5022AP
- Product Description: HP Pavilion Notebook
- Start Date: 1/09/2005
- End Date: 31/12/2005
- Launch Date: 28/08/2005

Below the form is a navigation bar with tabs for Notes, Companies, Contacts, Users, Costs, Tasks, Journals, Documents, E-Mail, Opportunities, Events, and Campaigns. The 'Contacts' tab is selected, showing a list of contacts:

Full Name	File As	Company	E-mail	Business Phone	Business Fax	Home Phone
Barney Anderson	Anderson, Barney	Premier Foods	barneya@premie...	+1 (206) 555-8411		+1 (206) 555-t
Gillian Meyer	Gillian Meyer	Premier Foods	gillianm@premier...	+1 (206) 555-8411		

At the bottom of the window, it indicates '3 Items (0.12 seconds)' and 'SQL View Version: 6.3.49'.

4. Click Save and Close.

Take me back to the Exercise ([Linking Contacts to a Campaign: Exercise](#))

Take me to the next Exercise ([Using Direct Mail for Campaigns: Exercise](#))

3.7 Using Direct Mail for Campaigns: Exercise

Send an E-mail to all the Contacts linked to this Campaign.

Campaign Name:	HP Pavilion Notebook Promotion
Report Name:	Campaign Report with Related Contacts for Export
File Format:	Excel 8.0 Tabular (30)
File Path/ Name:	C:\Program Files\MXContact\Campaign Contacts.xls
Template Name:	MXContact_MailMerge_Campaigns_Excel_Data.dot

Show me the **Solution** ([Using Direct Mail for Campaigns: Solution](#))

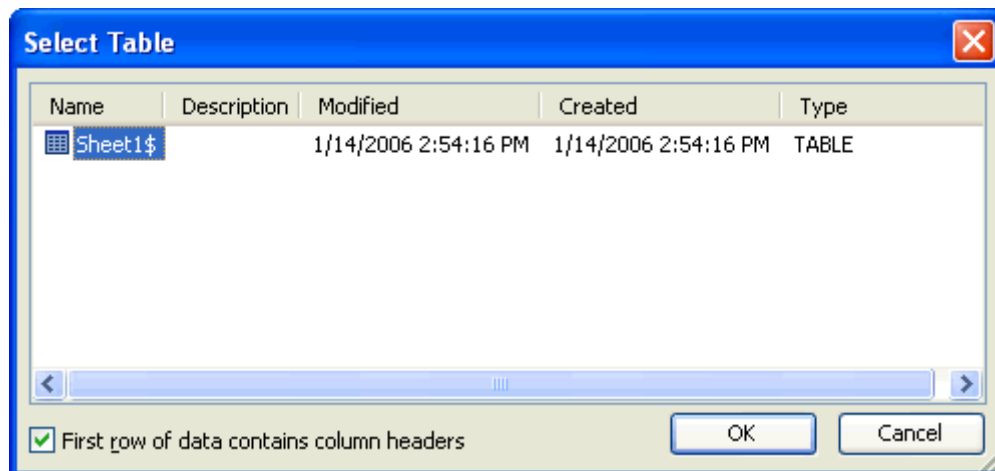
3.8 Using Direct Mail for Campaigns: Solution

Send an E-mail to all the Contacts linked to this Campaign.

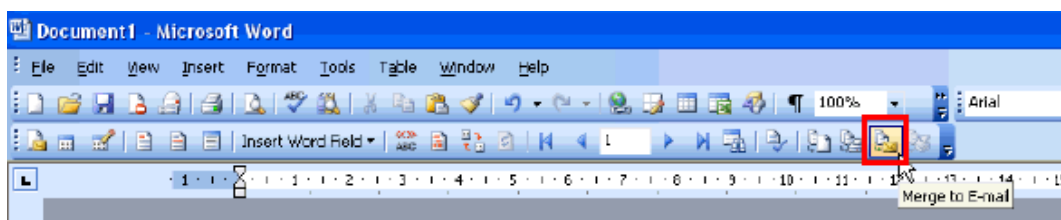
Campaign Name:	HP Pavilion Notebook Promotion
Report Name:	Campaign Report with Related Contacts for Export
File Format:	Excel 8.0 Tabular (30)
File Path/ Name:	C:\Program Files\MXContact\Campaign Contacts.xls
Template Name:	MXContact_MailMerge_Campaigns_Excel_Data.dot

Basic Steps:

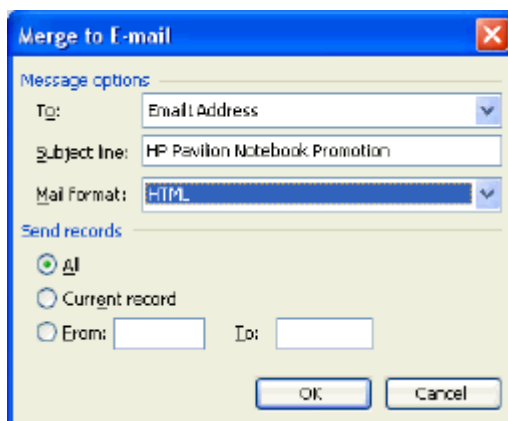
1. Click on the Campaigns folder and select the HP Pavilion Notebook Promotion.
2. Click on the Mail Merge tab.
3. Select the Report Name Campaign Report with Related Contacts for Export.
4. Select the Excel 8.0 Tabular (30) File Format.
5. Select the Template MXContact_MailMerge_Campaigns_Excel_Data.dot.
6. Click on the Create Mail Merge File button. When the Select Table screen appears, click on OK.



7. The Merge Document will appear. Click on the Merge to E-mail button.



8. A Merge to E-mail options screen will appear.



9. Select Email1Address in the To field. Type in a subject (Campaign Name) and select HTML in the Mail Format field.
10. The document will be merged with each Contact linked to this Campaign.
11. Close the documents.

Take me back to the Exercise ([Using Direct Mail for Campaigns: Exercise](#))