



Setting Up and Running Postcard Automation

Scheduling Automated Postcard Mailings

The Edge Automatic Postcard feature is designed to automatically place postcard orders on behalf of the retailer to ensure timely delivery of promotional notices and greetings such as birthday, anniversary, and thank you notes. This can be used in conjunction with other postcard mailings that may not lend themselves to automation.

Go to our training calendar at www.edgeuser.com to find out more about the free Auto Postcard training webinar to ensure you can make the most of the feature. If you don't have the Auto Postcard feature set up, email our training staff at postcards@ajsllc.com for an appointment to get you set up. It usually takes only about 20 minutes.

Setting Up a Task in Windows

For each automated postcard job, you must configure a Windows scheduled task as follows:

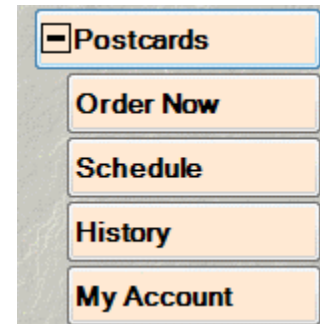
- The scheduled task should run the regular Edge.Exe program, with a command line option of `-postcard`.
- The scheduled task should run once a week; we suggest Thursday, sometime after close of business (this will give you time to review the job before it is processed on Mondays).
- The scheduled task should run whether or not a user is logged in. This will require you to provide a user name and password for the task. Take care not to change the password once the task is scheduled.

This is accomplished via the Windows Scheduled Task facility, which differs from version to version of Windows. See the document Setting Up a Windows Task for more information.

Configuring New Postcard Automation in The Edge

Postcards previously defined for ad hoc mailings can be imported. For more information, see Importing Existing Postcard Presets below.

To configure The Edge to send automatic postcard jobs from scratch, it is necessary to schedule them. On The Edge main screen, in the **Customers** section, the **Postcards** tab now has four subordinate tabs. For those who are familiar with the old functionality, running ad hoc postcard mailings is now located under the **Order Now** button.



The account management functionality, which used to be under the **Supervisor** tab under **Postcards**, is now under the **My Account** tab.

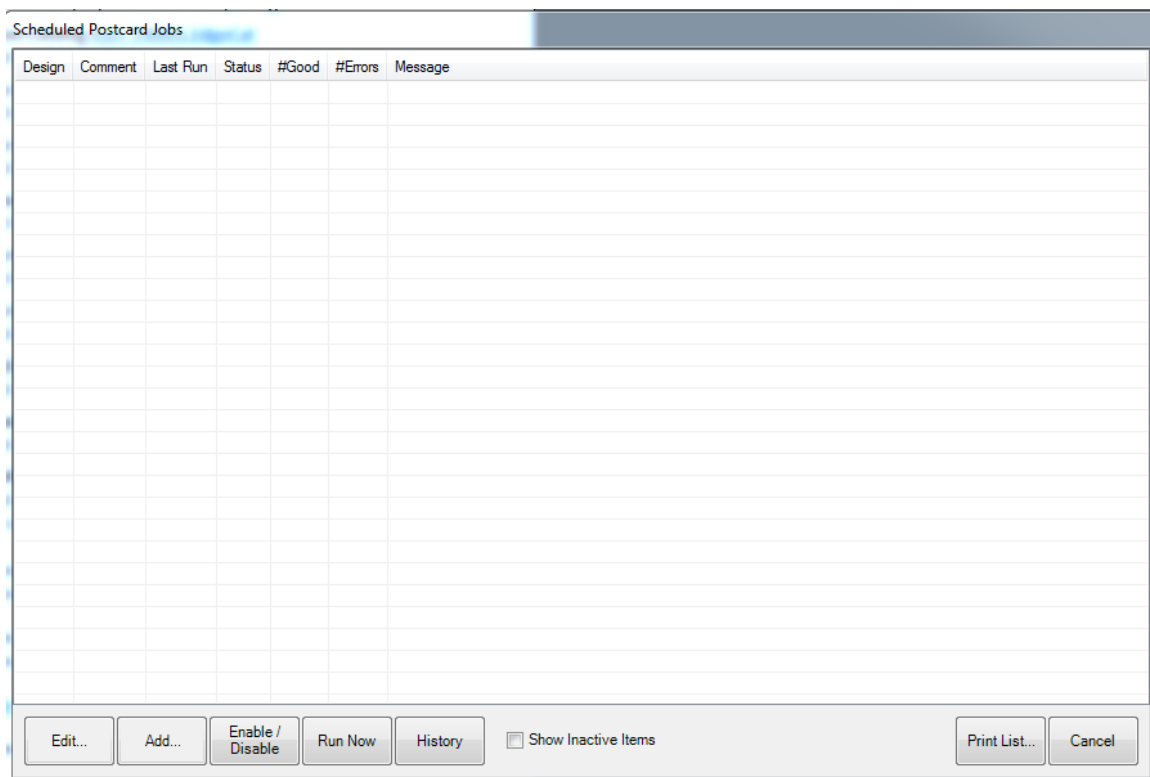
There are now two new buttons, **Schedule** and **History**.

Using the Schedule Option

Schedule is where you specify which postcards are to be generated each week. This function is password protected. You will need permission to send a job to the Internet print house.

To select and configure a job:

1. Select **Customer>Postcards>Schedule**. Once you clear security, the **Scheduled Postcard Jobs** window will appear. The first time you see it, it will be empty.



- Click **Add** to specify a postcard job. The **Schedule Automatic Postcards** window will appear.

Schedule Automatic Postcards

Automatic Schedule
 This postcard will be sent automatically, depending on how you have set up your Windows scheduled tasks.
 Please enter a note below to identify this automatic postcard job.
 Birthdays
 This automatic task is enabled.

Postcard Options
 Postcard Design: BD8: Birthday - Name in Candles
 * Offer: 10% on any single purchase
 Disclaimer: Expires 60 days after your birthday
 Postage Class: Pre-Sort Standard
 Delivered by 1/13/2010, \$0.89 each.

Customer Criteria
 Primary Address Only, Preferred Phone Only, Preferred eMail Only, customer birthday Date Range: 1/31/2010(40) to 2/6/2010(46)

Presets... OK Cancel

The **Schedule Automatic Postcards** window strongly resembles the **Order Now** functionality, with the addition of a new field to specify an identifying note or comment and a checkbox by which you can enable or disable the automatic nature of the job.

- Enter a name for the mailing.
- Select a **Postcard Design**. Based on the design you choose, many Customer Criteria will be selected for you and will appear in the filter **Results** tab, discussed later. See step 8 for more information.
- Enter the promotion or greeting in the **Offer** field. You can provide a discount or simply say, "Happy Birthday."
- Enter a disclaimer if desired. For example, you may wish to limit the length of the offer or exclude a particular category.
- Select a postage class.
- From the **Customer Criteria** area, complete the parameters around which to generate the mailing. The **Customer Criteria** filter works just like **Customer Find**. Go through each tab and narrow your target audience.
- Let's call attention to the **Results** tab. Notice that many selections are made based on the postcard design you selected in step 4.

10. Filter further only if required.
11. Select the **Dates** tab and filter by the date of the event.
12. Select **Presets**.
13. Select **Save Settings**. Enter a name for the preset settings. For more about presets, see Recommended Presets below.
14. Click **OK**.

IMPORTANT!

It is important to remember that each automatic job will run each and every week, so each of your jobs should include customer criteria with a date range of 7 days. The Rolling Dates feature allows you to set a minimum and maximum number of days, weeks, months, quarters, or years from the date of the job. Note that a week in The Edge is Sunday to Saturday.

For example, if you are setting up an automatic mailing function, and you wish to always send cards 3 weeks in advance of an event, you would specify rolling weeks to Min 3/Max 3. This way, the job will look and find any event 3 weeks ahead. It will include associated targets that match within a week.

You should select the exact range based on your chosen postage class and your knowledge of your customer base.

Recommended Presets

Presets in The Edge allow you to save filters and settings for future use. For the Auto Postcard function, they are particularly helpful because they allow you define mailing parameters for repeated use. For example, if you want to send postcards to men with anniversaries in the next month, you can set those filters and save them. We recommend weekly female birthday, weekly male birthday, weekly anniversary, weekly “Thank You,” weekly service reminders. Therefore, when you are done setting the filter, select **Presets** to save the settings.

Using the filtering steps shown above in steps 8-12 of configuring the job, the following table outlines the settings for each of the recommended presets.

Occasion	Postcard Design	Celebrant/Target	Dates	Customer Field to Select
Female Birthday	Birthday Female Postcards	Female	Rolling 3 weeks in advance	Birthday
Male Birthday	Birthday Male Postcards	Male	Rolling 3 weeks in advance	Birthday
Anniversary	Anniversary Cards	Couple	Rolling 4 weeks in advance	Anniversary
Thank You	Thank You card	Primary Contact	Rolling 2 weeks before	Merchandise tab: set a dollar amount spent
Service Reminder	Service Reminder Card	Primary Contact	Rolling 26 weeks before	Merchandise tab: set dollar amount spent

Importing Existing Postcard Presets

1. Select **Customer>Postcards>Schedule**. Once you clear security, the **Scheduled Postcard Jobs** window will appear. The first time you see it, it will be empty.
2. Click **Add** to specify a postcard job. The **Schedule Automatic Postcards** window will appear.

The **Schedule Automatic Postcards** window strongly resembles the **Order Now** functionality, with the addition of a new field to specify an identifying note or comment, and a checkbox by which you can enable or disable the automatic nature of the job. This option can be disabled if a job is not to be run for a period of time.

3. Select **Presets** and from the context menu, select **Load Settings**.
4. From the **Load Settings** window, select the **Show Similar** checkbox.
5. Select the preset that you want to import and select **OK**.
6. Enter a name for the mailing.

Running Jobs

If you have properly set up both The Edge and Windows Scheduled Tasks, then your jobs will each run automatically once each week.

Run Now

If something goes wrong with the automated mailing, or if you want to run an addition mailing, you can run the job again manually using the **Run Now** button. In this case, do not go through the Windows Scheduler because that will result in duplicate automated mailings. In this case, go into The Edge, go to the list of scheduled postcards, and run just that batch using **Run Now**.

WARNING!

Clicking the Run Now button will not prevent the job from running as scheduled automatically as well, and might very well result in some customers receiving duplicate postcards at extra cost to you. You

should only use the **Run Now** button if you know that the automatic job failed. For this reason, the **Run Now** button requires a supervisor override.

Job History

After your jobs have run at least once, the **Scheduled Postcard Jobs** window will include the last run date and status in the list.

Design	Comment	Last Run	Status	#Good	#Errors	Message
BD8	Birthdays	12/22/2009 2:56:54 PM	Success	16	0	
TY5	Major Purchases	12/22/2009 3:58:45 PM	Success	137	0	

To see more details about a particular job:

1. Highlight the row in the list and click **History**. The **Postcard History** screen will show a list of times that the selected job was run, and the results of each time.

SFJ-16-BD8-PFC--091222-145352-01-01-55689
 BD8: Birthday - Name in Candles
 * Offer: 10% on any single purchase
 Disclaimer: Expires 60 days after your birthday
 Primary Address Only, Preferred Phone Only, Preferred eMail Only, customer birthday

Design	Comment	When	Status	# Sent	# Errors	Error
BD8	Birthdays	12/22/2009 2:56:41 PM	Success	16	0	
BD8	Birthdays	12/15/2009 2:53:52 PM	Success	18	0	

2. To view the details of the job, select the record. The details are shown in the top half of the screen.
3. If you highlight one of the rows and click **Details**, a list of customers that were included in the job will appear.

16 unique customers (16 rows) were sent Postcard 'BD8' on 12/15/2009 2:53:52 PM

ID#	Last Name	First Name	Spouse Last	Spouse First	Phone	Phone	eMail	eMail	Addr	Company
001-00458	Haskell	Joe		Jeanne					WORK	
001-00907	Sheppard	Frankie	Shepherd	Bill					WORK	
001-01104	Masonhall	Adrienne		Andy	HOME	(203)787-9877			SUMMER	
001-02139	Shullsberg	Jean			HOME	(860)466-4909			HOME	
001-02426	Shives	Julie			WORK	(860)579-5656	HOME	julieshives@hotmail.com	WINTER	
001-02688	Ville	Amanda							WORK	
001-02694	Holiday	Ellen			WORK	(860)847-1646	WORK	ellenholiday6197@hotmail.com	HOME	
001-04384	Thorpe	Sandy			WORK	(860)506-7638			HOME	
001-04837	Grandin	Pam							HOME	
001-05054	Beaver	Linda			HOME	(860)427-6715	HOME	lindabeaver@msn.com	HOME	

Edit... Add... Delete Group / Mailing List Gray items are not duplicates; they are not for primary contact. Print List... Cancel

NOTE!

Depending on your selected parameters, it is possible that a single run of a postcard job will send a postcard to each of the two people on a single account. In this case, the history screen will show the number of cards mailed, and the customer list might show fewer rows.

All History

While we have already explained how to see the history of a particular scheduled job, the **History** button on the main screen will show the history of all postcard jobs, automatic or on demand, since the introduction of the history feature.

Postcard History

SFJ-137-TY5-PSTD--091222-155813-01-01-38596
 TY5: Thank You - Fireworks
 * Offer: We appreciate your business.
 Disclaimer: Please come back often.
 Primary Address Only, Preferred Phone Only, Preferred eMail Only, Spending at least \$2,000.00

Design	Comment	When	Status	# Sent	# Errors	Error
TY5	Major Purchases	12/22/2009 3:58:13 PM	Success	137	0	
LN8	On Demand	12/22/2009 3:02:12 PM	Success	2051	0	
BD8	Birthdays	12/22/2009 2:56:41 PM	Success	16	0	
BD8	Birthdays	12/15/2009 2:53:52 PM	Success	18	0	

Details Print List... Cancel

In the above illustration, you can see that the Birthdays job ran twice, the Major Purchases job ran once, and there was also one on-demand (Order Now) job for a Ladies Night event.

As in the previous case, highlighting a row and clicking the **Details** button will yield a list of customers to whom the cards were sent.

Customer Activity

Postcards sent after the introduction of the history feature will also appear on the activity list on the customer edit screen, as illustrated below.

Criteria

Date	Sale#	Stock#	Sold	Retail	Desc
11/22/2003	002-00011-001	002-00005-001	\$500.00		Gift Certificate 002-00005-001 GIFT CERT# 002-00005-001
11/20/2003	002-00007-004		(\$478.80)		Store Credit / Credit Memo
11/20/2003	002-00007-003	002-00005-001	\$500.00		Gift Certificate 002-00005-001 GIFT CERT# 002-00005-001
11/20/2003	002-00007-002		\$1.20		CT State Sales and Use Tax (6%)
11/20/2003	002-00007-001		\$20.00		MISC: Mixed Goods: bubble gum
11/19/2003	002-00005-002	002-00005-001	(\$500.00)		Gift Certificate BUY 002-00005-001 To Joe and Jeanne Haskell, merry Christmas
12/24/2000	001-09240-003		\$105.56		CHECK
12/24/2000	001-09240-002		\$6.56		Sales Tax
12/24/2000	001-09240-001	001-333-00020	\$99.00	\$99.00	18" 4.5MM SINGLE STRAND FRESH WATER PEARLS, 14K CLASP
12/22/2009	Postcard	BD8			Success Birthdays SFJ-16-BD8-PFC-091222-145641-01-01-53592

Note that there is a checkbox labeled **Postcards** to include or exclude postcards in the activity list.

Multi-Store Considerations

A scheduled task will automatically run only in the store where it was created, even though the scheduled task definition will be transferred to the other stores. However, you can interactively **run now** any scheduled task.

Postcards should be sent from one store. If you have multiple stores, and you want to generate automatic postcards from each store (e.g., you want your postcards to have different return addresses), contact postcards@ajsllc.com.

Best Practices

It's important to note that effective use of the Auto Postcard function hinges on good customer list maintenance. If customer birthdays are wrong or if a customer has changed his address, you could offend someone or at least, waste the cost of the card and postage.

We recommend the following best practices:

1. When adding anything to the schedule, please remember that these cards go out WEEKLY, not monthly. Therefore, anything you want to add to the schedule should be scheduled with enough time in the criteria according to what timeframe you want it to hit mailboxes.
2. You can preview the cards that are scheduled to go out that week, any day from a Monday to a Thursday before 11:00 p.m. by going to **Customer ► Find ► Load Settings** and choose which postcard you want to preview and highlight it. Select **OK** and then **OK** once more.
3. When you close up for the day, **DO NOT TURN OFF YOUR PC, SERVER, OR ANY COMPUTER THAT WE SET UP THE TASK ON**, usually on Thursday evenings. You can put it to sleep but do not turn it off. If you do the cards will not run and will not be ordered.
4. If you change an admin password on your server PC and the password is not changed in the task, your cards will not go out.
5. Periodically, at least twice a year, review your customer database to ensure the accuracy of your information.
6. Occasionally do a manual filter of customers using the same filters of your postcard presets and view the results to ensure the list matches your desired results.
7. Train your staff to take a moment with customers to review their information whenever they come into the store.
8. If you need any assistance with setting up your Automatic Postcard Scheduler or presets for postcards, please call us at 1-866-580-3343 x 9903 or email us at Service@ajsllc.com.

FAQs

Now that I can send postcards automatically, is there any reason to send postcards "on demand" anymore?

Yes. In-store events, Christmas, Happy Holidays, Valentine's day, etc., are all important occasions for postcards can be sent on demand.

Can I automate postcards for annual occasions or holidays?

No. The automatic postcard feature is designed to run postcards around personal events on a weekly basis.

What if I make a mistake in my schedule setup?

If you discover your mistake and notify us before close of business on the Friday before the job will be processed, we might be able to cancel the job. Send an email to postcards@ajsllc.com.