



# Rameses Marketing- Quick Guide

Viktoria Dimitrova  
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## INTRODUCTION

From the Manager Menu click the **Marketing** button, see Fig. 1. This is your own in-house marketing tool.

This will open the Marketing Main Screen (see Fig. 2) providing a lot of options for refining your search criteria.

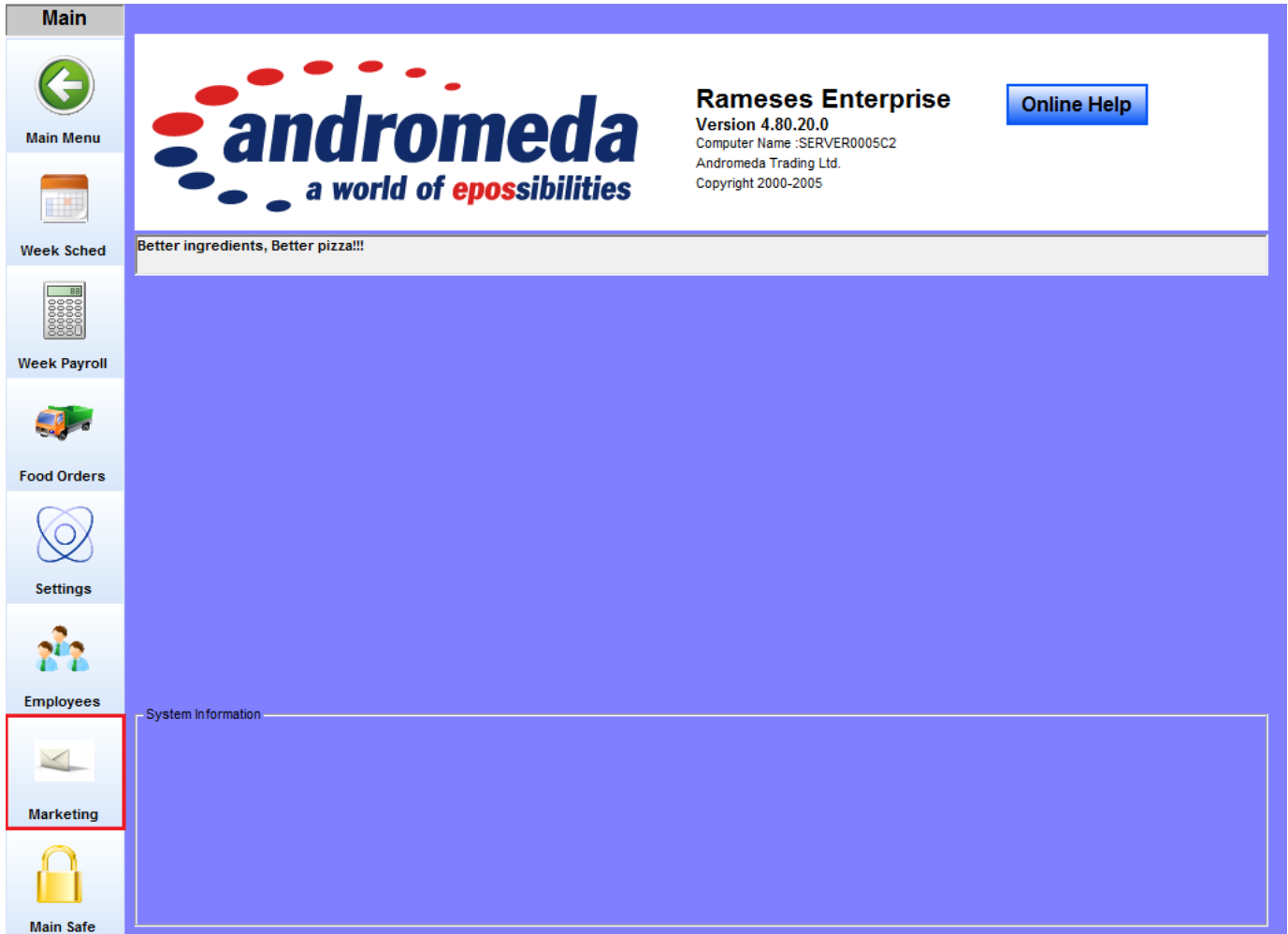


Figure 1: Accessing the Marketing options

# 1. THE MARKETING MAIN SCREEN

Now, you have opened the Marketing Main Screen.

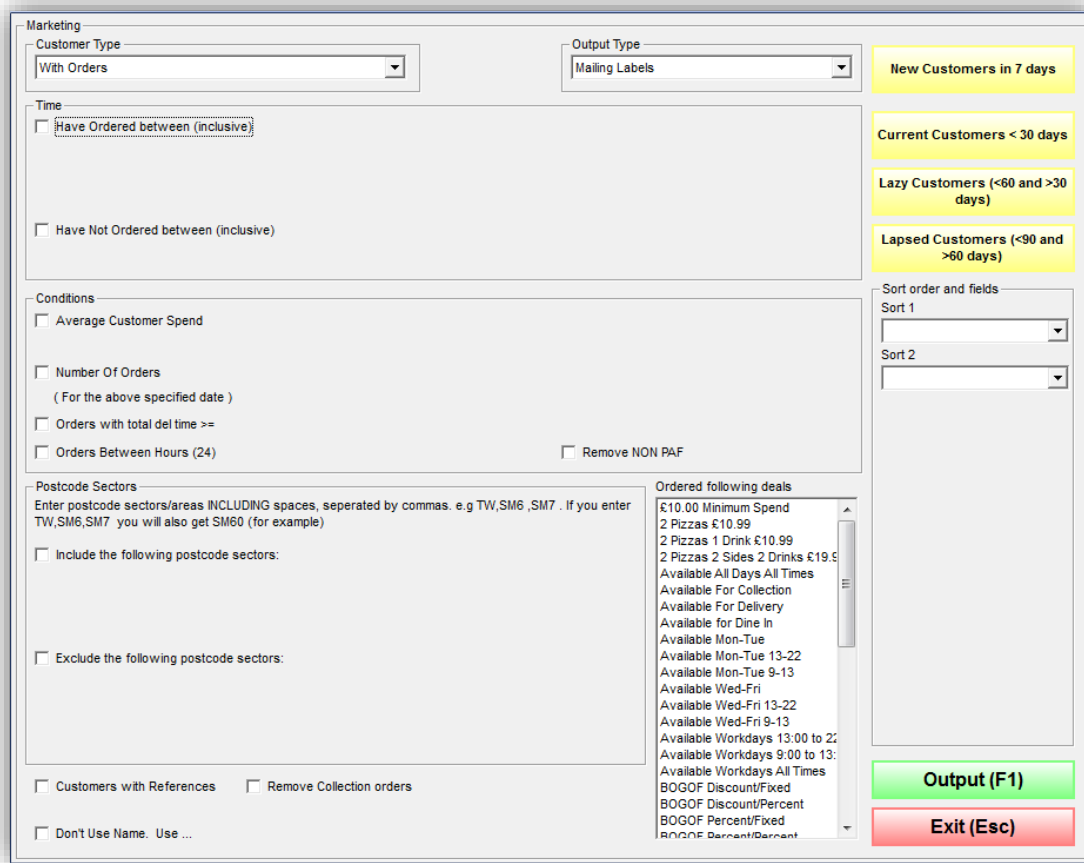


Figure 2: The Marketing Main Screen

If you click the green **Output (F1)** button, see Fig. 2, without selecting any of the search fields, you will be presented with a list of everyone who has ever ordered. You can print out the list or export the data in your preferred format.

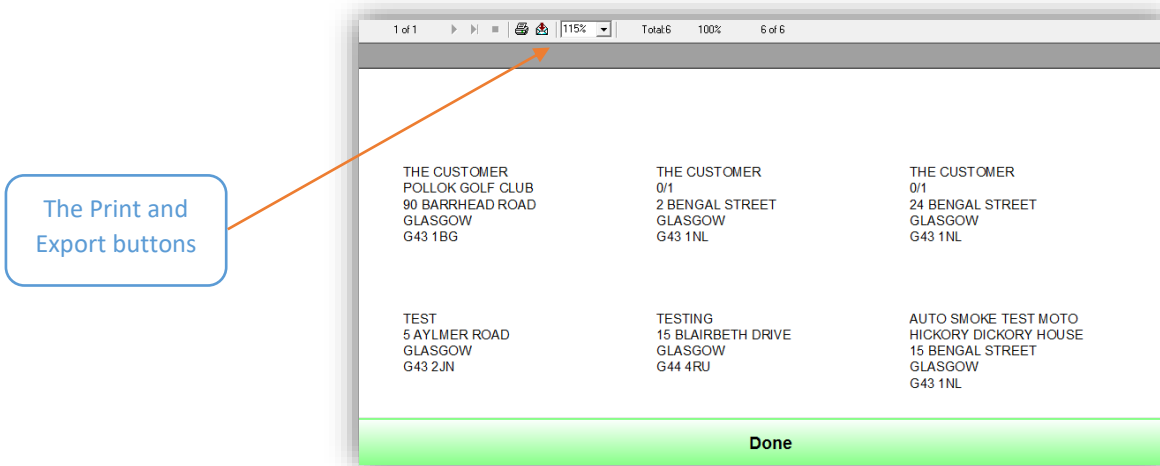


Figure 3: A List of Customers

If you want to make a specific list of customers, then alter the parameters to refine your search by ticking the small boxes to the left, as shown in Fig. 4.

The screenshot shows a 'Marketing' search interface. At the top, 'Customer Type' is set to 'With Orders' and 'Output Type' is 'Mailing Labels'. The interface is divided into several sections: 'Time', 'Conditions', 'Postcode Sectors', and 'Ordered following deals'. In the 'Time' section, 'Have Ordered between (inclusive)' and 'Have Not Ordered between (inclusive)' are both checked. In the 'Conditions' section, 'Average Customer Spend', 'Number Of Orders', 'Orders with total del time >=', and 'Orders Between Hours (24)' are all checked. In the 'Postcode Sectors' section, 'Include the following postcode sectors:' and 'Exclude the following postcode sectors:' are both checked. A callout box on the left contains the text: 'To make a specific list of customers, alter the parameters to refine your search by ticking the boxes.' Blue arrows point from this callout box to each of the checked checkboxes in the 'Time', 'Conditions', and 'Postcode Sectors' sections. The 'Ordered following deals' section on the right lists various deal types and their availability.

Figure 4: Refining your search

After ticking the boxes new fields will appear to help you refine your search.

The main refine search panels are the following:

- **Customer and Output Type**
- **Time**
- **Conditions**
- **Postcode Sectors**
- **Ordered following deals**
- **Additional options (3)**

All these options are further explained below.

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## 2. THE CUSTOMER AND OUTPUT TYPE DROPDOWNS

The **Customer Type** dropdown allows you to select customers with and without orders.

The **Output Type** dropdown gives you a couple of more options such as:

- **Mailing Labels** - displays a list of customers with their addresses, see Fig. 6
- **Phone Labels** – displays a list of customers with their phone numbers on top, see Fig. 7
- **SMS** - the SMS service used for marketing purposes allows a Rameses user to text customers they have on the system. Targeted marketing can also be done by changing the search options for customers.

**Note:** This is a paid feature so please contact us if you want to have it enabled.

- **CSV** – select this to extract a file which will be downloaded to your Local Disk (C:)
- **Report** - displays a detailed list of customers with their name, phone number, address, post code, order type, date of last order, see Fig. 8.

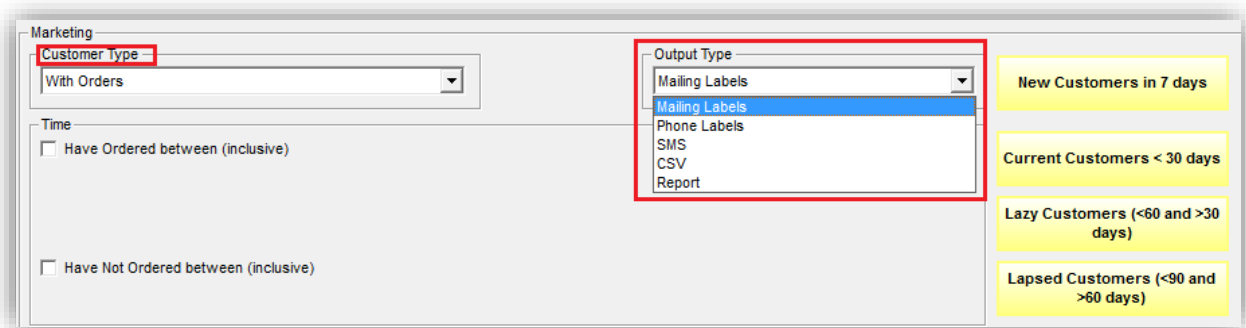


Figure 5: The Customer and Output Type dropdowns



Figure 6: Customers list after selecting 'Mailing Labels'

1 of 1    115%    Total:6    100%    6 of 6

03264964 POLLOK GOLF CLUB 90 BARRHEAD ROAD GLASGOW G43 1BG	02093928482 0/1 2 BENGAL STREET GLASGOW G43 1NL	0123123123 0/1 24 BENGAL STREET GLASGOW G43 1NL
123456789 5 AYLNER ROAD GLASGOW G43 2JN	123458782 15 BLAIRBETH DRIVE GLASGOW G44 4RU	02035102510 HICKORY DICKORY HOUSE 15 BENGAL STREET GLASGOW G43 1NL

**Done**

Figure 7: Customers list after selecting 'Phone Labels'

1 of 1    115%    Total:6    100%    6 of 6



### Marketing Labels

18/10/2016 0 - 24/01/2017 0    25/01/2017

ID	Name	Phone	Road#	PCode	Tck	LstOrd	Gross	Type	Source	Email	Org	Prem
1	THE CUSTOME R	03264964	90 BARRHEAD ROAD	G43 1BG	1	10/19/2016	£16.99	Delivery	Shop			
2	THE CUSTOME R	02093928482	2 BENGAL STREET	G43 1NL	1	01/20/2017	£59.96	Delivery	Shop			
3	THE CUSTOME R	0123123123	24 BENGAL STREET	G43 1NL	1	01/24/2017	£35.00	Delivery	Shop			
4	TEST	123456789	5 AYLNER ROAD	G43 2JN	0	10/18/2016	£31.98	Delivery	Shop			
5	TESTING	123458782	15 BLAIRBETH DRIVE	G44 4RU	8	10/18/2016	£14.99	Delivery	Shop			
6	AUTO SMOKE TEST	02035102510	15 BENGAL STREET	G43 1NL	8	01/11/2017	£12.99	Delivery	Shop			
<b>Grand Total:</b>											<b>6</b>	

**Done**

Figure 8: Customers list after selecting 'Report'

You can print out all reports  or export them  in your preferred format by clicking the respective buttons.

### 3. THE TIME PANEL

The Time panel allows you to further refine your search by selecting customers who have ordered within a specific date range *Have Ordered between (inclusive)* or excluding certain period - *Have Not Ordered between (inclusive)*.

The Time Panel interface contains two sections for date selection. The first section has a checked checkbox for 'Have Ordered between (inclusive)'. Below it, the 'From' field is set to '01 January 2017' and the 'To' field is set to '16 January 2017'. There is an unchecked checkbox for 'and have ordered between (inclusive)'. The second section has a checked checkbox for 'Have Not Ordered between (inclusive)'. Below it, the 'From' field is set to '07 November 2016' and the 'To' field is set to '07 December 2016'.

Figure 9: The Time Panel

This function allows you to find out which customers have or have not ordered within a certain period. For example, if you wish to see a list of customers who have purchased from you between 1<sup>st</sup>- 16<sup>th</sup> Jan 2017 you would tick the box '*Have Ordered between (inclusive)*' and enter the relevant dates.

There is the option to define another time period – just click the second box '*and have ordered between (inclusive)*' and select the dates from the Calendar, see Fig. 10. When ready, click the green **Confirm (F1)** button.

If you wish to see a list of customers who have **not** made a purchase between 7<sup>th</sup> Nov 2016 - 7<sup>th</sup> Dec 2016, tick the box beside '*Have Not Ordered between (inclusive)*' and enter the dates.

This will help you find lapsed/regular customers and target them with the right marketing campaign.

The screenshot shows the Marketing interface on the left and a calendar selection window on the right. The Marketing interface has a 'Customer Type' dropdown set to 'With Orders'. The 'Time' section has 'Have Ordered between (inclusive)' checked, with 'From' set to '01 January 2017'. The 'and have ordered between (inclusive)' checkbox is also checked and highlighted with a red box, with its 'To' field set to '01 December 2016'. The 'Have Not Ordered between (inclusive)' checkbox is unchecked. The calendar window is titled 'Select an appropriate date' and shows a calendar for 'December 2016'. The date '1' is circled in red. Below the calendar, there is a 'Today' button, a year dropdown set to '2016', and a 'Current Selection' table with 'Day' 01, 'Month' 12, and 'Day' 16. A green 'Confirm (F1)' button is at the bottom right.

Figure 10: Select an appropriate date from the Calendar



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## 4. THE CONDITIONS PANEL

There are four options under the **Conditions** panel allowing you to make an even more refined search of your customers' database. These are the following:

- Average Customer Spend
- Number of Orders
- Orders with total del time >=
- Orders Between Hours (24)

### 4.1. Average Customer Spend

You can further narrow your search by specifying customers who spent an average amount greater than > or less than < an amount of your choice. For example, you might want to view a list with customers who spent more than £30, so first select the condition > and then enter the amount, as shown in Fig. 11.

The screenshot shows a 'Conditions' panel with a red border around the first row. The first row is checked and contains 'Average Customer Spend', a dropdown menu with '>' selected, and a text input field with '30'. Below the dropdown is the text 'Select the condition' and below the input field is 'Enter the amount of money'. The second row is unchecked and contains 'Number Of Orders' with the subtext '( For the above specified date )'. The third row is checked and contains 'Orders with total del time >=' with a spinner box set to '41'. The fourth row is unchecked and contains 'Orders Between Hours (24)'. There is also an unchecked checkbox for 'Remove NON PAF'.

Figure 11: Conditions > Average Customer Spend

### 4.2. Number of Orders

You can also set the search so that it shows customers by the number of orders they have placed. This allows you to see customers who have ordered greater than >, less than <, greater than or equal to >=, less than or equal to <=, or equal to = Number of orders your choice.

For example, you might want to view a list of customers who placed 3 or more than 3 orders for a specified period:

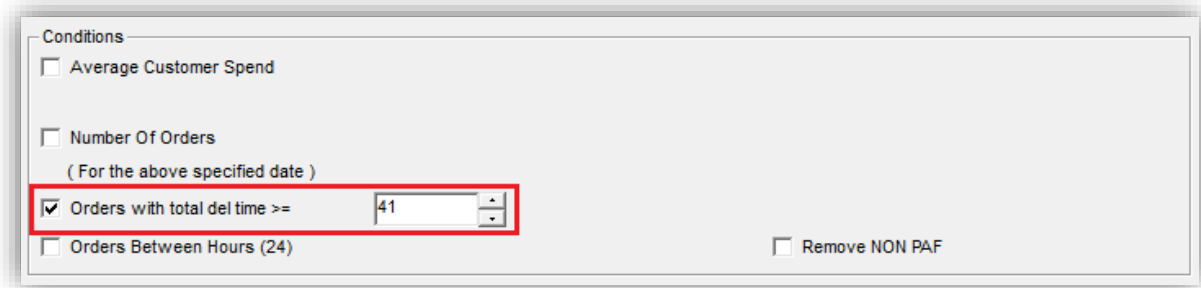
The screenshot shows a 'Conditions' panel with a red border around the second row. The second row is checked and contains 'Number Of Orders' with the subtext '( For the above specified date )', a dropdown menu with '>=' selected, and a text input field with '3'. Below the dropdown is the text 'Select the condition' and below the input field is 'Enter the amount of orders'. The first row is unchecked and contains 'Average Customer Spend'. The third row is unchecked and contains 'Orders with total del time >='. The fourth row is unchecked and contains 'Orders Between Hours (24)'. There is also an unchecked checkbox for 'Remove NON PAF'.

Figure 12: Conditions > Number of Orders

### 4.3. Orders with total del (delivery) time

This shows all customers who received their orders above the selected time, i.e. their order was delayed.

Use the arrows to increase or decrease the delay time. Now, when you click the **Output (F1)** button all customers who have had a delay in service equal to the time specified will be listed.



The screenshot shows a 'Conditions' dialog box with the following elements:

- Average Customer Spend
- Number Of Orders  
( For the above specified date )
- Orders with total del time >= 41
- Orders Between Hours (24)
- Remove NON PAF

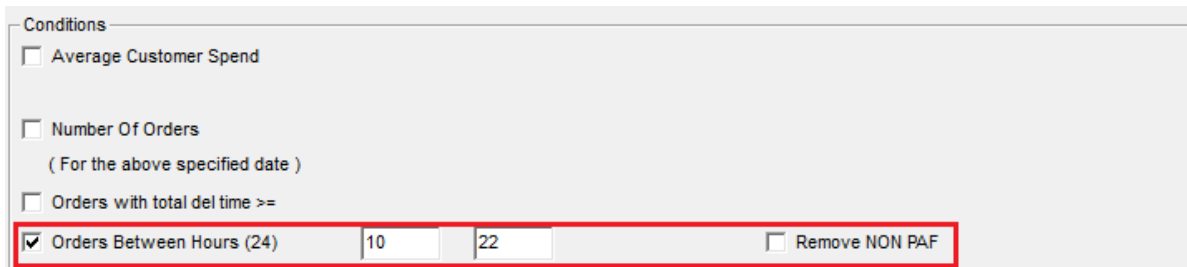
The 'Orders with total del time >=' option is selected, and the value '41' is entered in the adjacent text field. A red box highlights the selected option and its value field.

Figure 13: Orders with total delivery time

### 4.4. Orders between hours (24)

This function is used for viewing all orders placed within a certain time period by setting the start time and the end time.

Enter the start and end time in the field. Now, when you click the **Output (F1)** button all orders that have been placed between 10:00 and 22:00 will be listed.



The screenshot shows a 'Conditions' dialog box with the following elements:

- Average Customer Spend
- Number Of Orders  
( For the above specified date )
- Orders with total del time >=
- Orders Between Hours (24) 10 22
- Remove NON PAF

The 'Orders Between Hours (24)' option is selected, and the start time '10' and end time '22' are entered in the adjacent text fields. A red box highlights the selected option and its time fields.

Figure 14: Orders between hours

**Remove NON PAF** - Use this to filter out any incomplete manual addresses.

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## 5. POSTCODE SECTORS

There are two search options under the **Postcode Sector** which are:

- Include the following postcode sectors
- Exclude the following postcode sectors

Customers can be grouped and included (or excluded) from the Output according to the post code area in which they live. Tick the relevant box and then enter the postcode sector/areas in the blank fields.

Now, when you click the **Output (F1)** button all the customers living within the postcode sector specified will be listed. If you wish to be even more specific you can look up the exact postcode and see all customers who live within it.

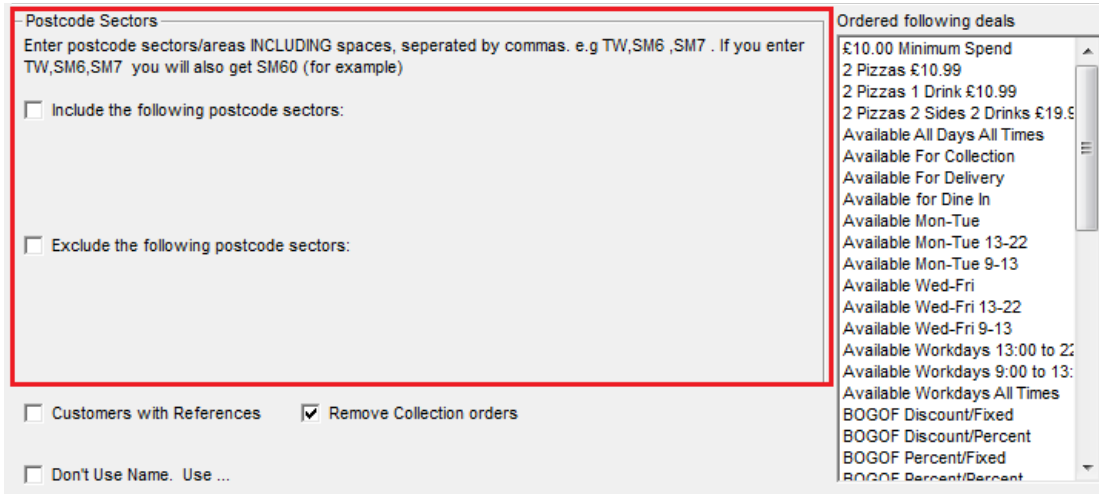


Figure 15: Filter customers according to post code area

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## 6. ORDERED FOLLOWING DEALS

Use this menu to search for customers who have ordered a particular special offer or menu in the past.

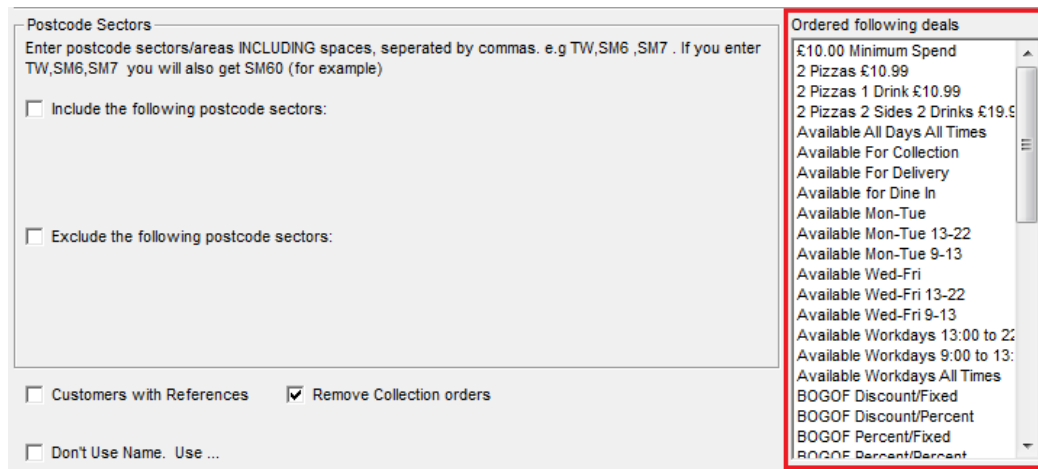


Figure 16: Filter customers according to deals

Scroll up and down to locate the required special offer. Then click on **Output (F1)** to come up with a list of all the customers who have ordered this particular offer/deal in the past.

## 7. ADDITIONAL OPTIONS

There are three additional options to search for customers, as shown in Fig. 17.

The screenshot shows a 'Marketing' search interface with several sections:

- Customer Type:** A dropdown menu set to 'With Orders'.
- Output Type:** A dropdown menu set to 'Mailing Labels'.
- Time:** A section with four date pickers. The first two are 'From' (20 January 2017) and 'To' (25 January 2017). The next two are 'and have ordered between (inclusive)' (01 December 2016) and 'Have Not Ordered between (inclusive)'. There are checkboxes for 'Have Ordered between (inclusive)' (checked) and 'Have Not Ordered between (inclusive)' (unchecked).
- Conditions:** A section with checkboxes for 'Average Customer Spend', 'Number Of Orders (For the above specified date)', 'Orders with total del time >=' (unchecked), 'Orders Between Hours (24)' (checked, with input fields for 10 and 22), and 'Remove NON PAF' (unchecked).
- Postcode Sectors:** A section with a text input field and checkboxes for 'Include the following postcode sectors:' and 'Exclude the following postcode sectors:'.
- Ordered following deals:** A list of deals including '£10.00 Minimum Spend', '2 Pizzas £10.99', '2 Pizzas 1 Drink £10.99', '2 Pizzas 2 Sides 2 Drinks £19.99', and various availability conditions like 'Available All Days All Times', 'Available For Collection', 'Available For Delivery', 'Available for Dine In', 'Available Mon-Tue', 'Available Mon-Tue 13-22', 'Available Mon-Tue 9-13', 'Available Wed-Fri', 'Available Wed-Fri 13-22', 'Available Wed-Fri 9-13', 'Available Workdays 13:00 to 22:00', 'Available Workdays 9:00 to 13:00', 'Available Workdays All Times', 'BOGOF Discount/Fixed', 'BOGOF Discount/Percent', 'BOGOF Percent/Fixed', and 'BOGOF Percent/Percent'.
- Sort order and fields:** Two dropdown menus for 'Sort 1' and 'Sort 2'.
- Buttons:** Three buttons on the right: 'New Customers in 7 days' (yellow), 'Current Customers < 30 days' (yellow), 'Lazy Customers (<60 and >30 days)' (yellow), 'Lapsed Customers (<90 and >60 days)' (yellow), 'Output (F1)' (green), and 'Exit (Esc)' (red).
- Red Box:** A red rectangular box highlights the bottom-left area, containing the checkboxes for 'Customers with References', 'Remove Collection orders', and 'Don't Use Name. Use ...'.

Figure 17: Additional Search Options

### 7.1. Customers with References

Tick this box to come up with a list of all the customers who have a reference saved in the system in relation to a specific order. Click **Output (F1)** to come up with a list of all the orders, made by customers with a reference saved in the system.

### 7.2. Remove Collection Orders

Tick this box to create a list of past orders, excluding the orders which have been collected by the customers and not delivered. Now click on **Output (F1)** in order to come up with a list of all past orders, excluding the orders which have been collected by the customers, i.e. **Collection** Order Type.

### 7.3. Don't Use Name. Use...

If you wish to use a title other than the customer's name as it is entered in Rameses you can use the 'Don't Use Name' function. Normally the names appear as they are entered in Rameses.

If you tick this box and then enter the title you wish to use (for example **Mr.**) all customers will be shown with the same name or title you have just entered.

Now when you click **Output (F1)** the customers' names have been altered to the word, name or title that you have just designated, see Fig. 18. This can be especially useful when making address labels.

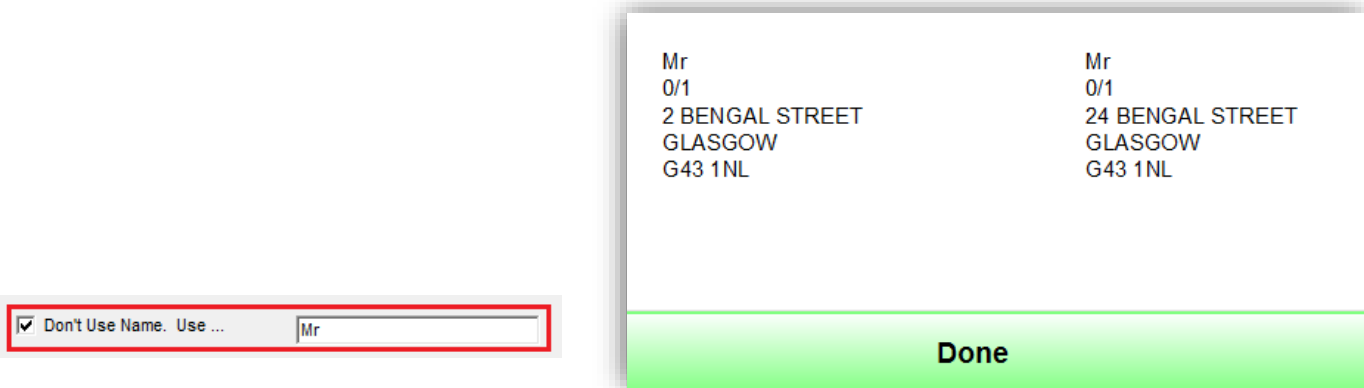


Figure 18: Customers' Names > Mr.

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## 8. QUICK PRE-DEFINED OPTIONS

There are four more buttons on the right-hand side of the screen marked in yellow as shown in Fig. 2. These are pre-defined marketing options allowing you quick access to the following reports:

### 8.1. New Customers in 7 days

Click this button to create a list containing all new customers who have ordered in the last 7 days. Now click on **Output (F1)** to come up with a list of all past orders made by new customers from the last 7 days of the month.

### 8.2. Current Customers < 30 days

Click this button to create a list containing all current customers who have ordered in the last 30 days or less. Now click on **Output (F1)** to come up with a list of all past orders made by customers from the last 30 days or less.

### 8.3. Lazy Customers (<60 and >30 days)

Click this button to create a list of all the past orders made by customers in more than 30 and less than 60 days ago. Now click on **Output (F1)** to come up with a list of all past orders made by those new customers.

### 8.4. Lapsed Customers (<90 and >60 days)

Click this button to come up with a list of all the orders made by customers in more than 60 and less than 90 days ago. Then click on **Output (F1)** to come up with a list of all the past orders made by those lapsed customers.

## The Sort Order and Fields

Use the Sort order and fields (see Fig. 19) options to set a specific order in the way past orders are listed.

Select a listing order based on phone, name, road name and post code/zip code. Now click on the **Output (F1)** button to come up with a list of all the past orders, pre-arranged by Phone, Name, Road Name or Post Code/Zip Code.

The screenshot shows the 'Marketing' software interface with several sections:

- Customer Type:** A dropdown menu set to 'With Orders'.
- Output Type:** A dropdown menu set to 'Mailing Labels'.
- Time:** A section with four date pickers. The first two are 'From' (20 January 2017) and 'To' (25 January 2017). The next two are 'and have ordered between (inclusive)' (01 December 2016) and another date (01 December 2016). There are checkboxes for 'Have Ordered between (inclusive)', 'and have ordered between (inclusive)', and 'Have Not Ordered between (inclusive)'. The 'and have ordered between (inclusive)' checkbox is checked.
- Conditions:** A section with checkboxes for 'Average Customer Spend', 'Number Of Orders (For the above specified date)', 'Orders with total del time >=' (with input fields for 10 and 22), 'Orders Between Hours (24)' (with input fields for 10 and 22), and 'Remove NON PAF'. The 'Orders Between Hours (24)' checkbox is checked.
- Postcode Sectors:** A section with a text area for 'Enter postcode sectors/areas INCLUDING spaces, separated by commas. e.g TW,SM6,SM7. If you enter TW,SM6,SM7 you will also get SM60 (for example)'. There are checkboxes for 'Include the following postcode sectors:' and 'Exclude the following postcode sectors:'. The 'Include the following postcode sectors:' checkbox is checked.
- Ordered following deals:** A list of deals including '£10.00 Minimum Spend', '2 Pizzas £10.99', '2 Pizzas 1 Drink £10.99', '2 Pizzas 2 Sides 2 Drinks £19.99', and various availability conditions like 'Available All Days All Times', 'Available For Collection', 'Available For Delivery', 'Available for Dine In', 'Available Mon-Tue', 'Available Mon-Tue 13-22', 'Available Mon-Tue 9-13', 'Available Wed-Fri', 'Available Wed-Fri 13-22', 'Available Wed-Fri 9-13', 'Available Workdays 13:00 to 22:00', 'Available Workdays 9:00 to 13:00', 'Available Workdays All Times', 'BOGOF Discount/Fixed', 'BOGOF Discount/Percent', 'BOGOF Percent/Fixed', and 'BOGOF Percent/Percent'.
- Sort order and fields:** A section highlighted with a red border, containing two dropdown menus labeled 'Sort 1' and 'Sort 2'.
- Buttons:** A green 'Output (F1)' button and a red 'Exit (Esc)' button.
- Other:** A 'Customers with References' checkbox, a 'Remove Collection orders' checkbox, and a 'Don't Use Name. Use ...' checkbox with a text input field containing 'Mr'.

Figure 19: The Sort Order and Fields

This is a close-up of the 'Sort order and fields' section. It shows a dropdown menu labeled 'Sort 1' with a list of options: '<Default>', 'Phone', 'Name', 'RoadName', and 'PostCode\Zip Code'. The entire section is enclosed in a red border.

## 9. THE MARKETING (F10) BUTTON

When making a delivery order, you may have noticed the **Marketing (F10)** button below the customer's contact details, see Fig. 20. Click on it to open the Marketing Contacts window shown on the right.

The options available here are the following:

- **Toggle Active (F1)** – disable a phone number so it will not be used by the system.
- **Do Not Market (F2)** – exclude the selected phone number from marketing campaigns.
- **Remove new Contact (F4)** – remove an email address from the system.
- **Do Not Market (F5)** – exclude the selected email address from marketing campaigns.
- **Toggle Work/Home (F6)** – click here to toggle between email addresses.
- **Save Phone (F7)** – type in and click to save customer's phone number.
- **Save Email (F8)** - type in and save the customer's email address.

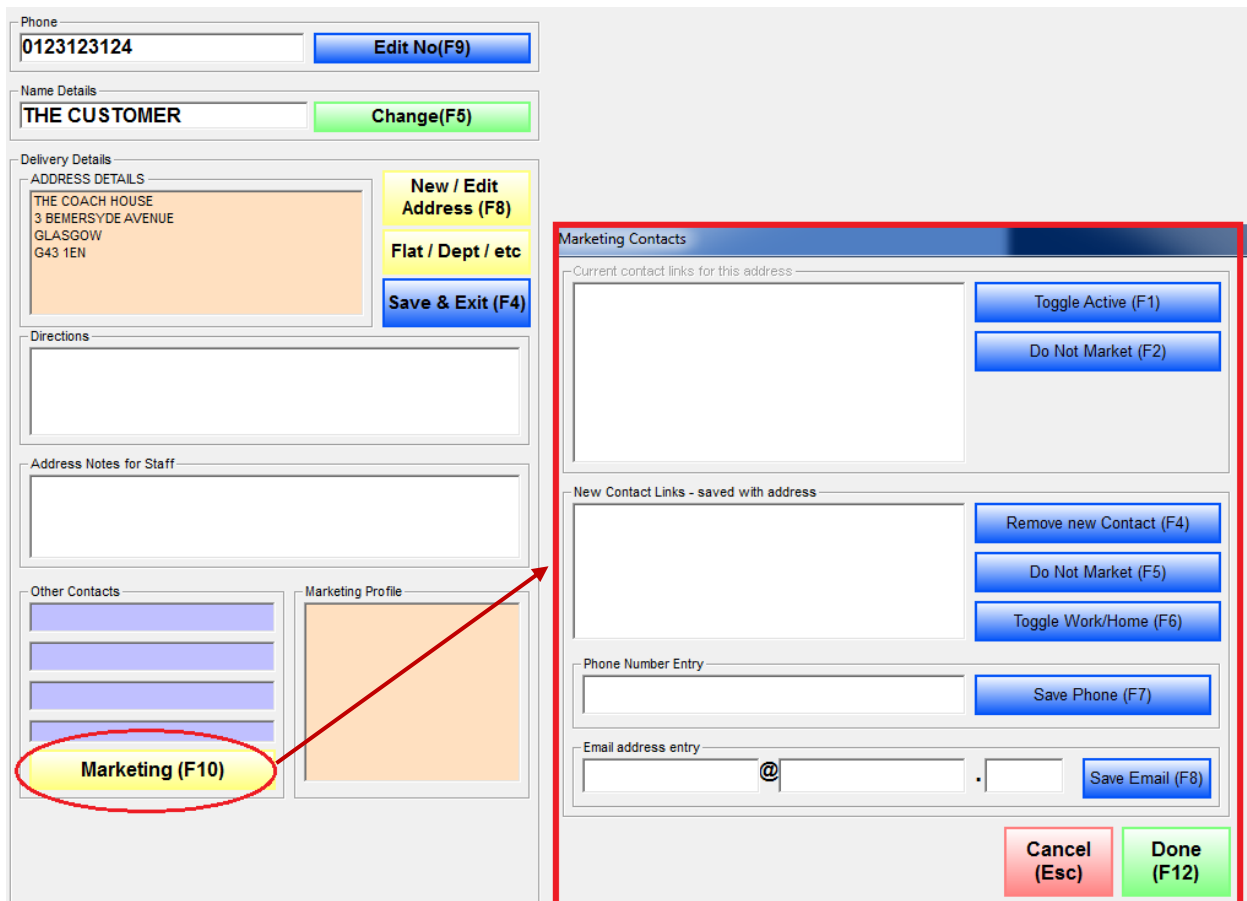


Figure 20: The Marketing (F10) button

Click the **Cancel (Esc)** button to cancel any changes and return to the Customer Details screen.

When ready with entering the marketing details as required click **Done** (or press **F12**).

Marketing Contacts

Current contact links for this address

3843832573

Disable (F1)

SMS Allowed(F2)

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New Contact Links - saved with address

1212121212  
 PIERRE@GMAIL.COM (HOME)  
 PIERRE@YAHOO.COM (WORK)

Remove new Contact (F4)

Do Not Market (F5)

Toggle Work/Home (F6)

Phone Number Entry

Save Phone (F7)

Email address entry

@YAHOO .COM

Save Email (F8)

Cancel (Esc) Done (F12)

**Note:** You **cannot** disable the last customer phone number or the one associated with the current order.

Marketing Contacts

Current contact links for this address

3843832573

Disable (F1)

Do Not Market (F2)

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New Contact Links - saved with address

1212121212  
 PIERRE@GMAIL.COM (HOME)  
 PIERRE@YAHOO.COM (WORK)

Remove new Contact (F4)

Do Not Market (F5)

Toggle Work/Home (F6)

Phone Number Entry

Save Phone (F7)

Email address entry

@YAHOO .COM

Save Email (F8)

**Cannot disable current order/last phone number**

Cancel (Esc) Done (F12)