Merchant (EndUserAdmin) Quick Start Guide

Rev. 3/2019

Table of Contents

EndUserAdmin Onboarding Process	1
EndUserAdmin - Welcome Email	1
SMB - Reset Password page	1
SMB - Automated Email after Changing the password	1
SMB - LogIn Page	2
SMB - Contacts (Default Page for EndUserAdmin)	2
Adding Contacts to Email Marketing	3
1. Manual adding contacts	3
a. View Contacts	3
b. Add a New Contact Button	4
c. Form to Create a New Contact	4
2. Importing Feature	5
a. Import Page	5
b. Selecting mapping fields	6
c. Pop-up	6
d. Completed	7
e. Info	7
3. Online Forms	8
a. Manage Forms	8
b. Form Builder	9
c. Getting online forms	10
Create a Master Template	11
Email Templates	12
Segmentation Dashboard	13
Segmentation Basics	13
Multiple Segmentations	15

Send Campaign Flow	16
Step 1. Select a Template	16
Step 2. Edit a Template	17
Step 3. Schedule the Campaign	20
Automated Campaigns	22
Step 1: Select a Template	23
Step 2. Edit a Template	23
Step 3: Activate an Automated Campaign	24
Reports	27
Opening Scheduled Campaigns:	28
Opening Executed Campaigns	29
SMB - Manage Coupons	30
Settings	32
Manage Profile	32
Company Users	32
Add New User	33

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02/21/2019	V 1.1	V 10.0.2	SMB rebranding to Heartland Email Marketing

EndUserAdmin Onboarding Process

EndUserAdmin - Welcome Email

Sales_Operations user after creating a new Company in the Heartland Email Marketing system is creating a user for the merchant with EndUserAdmin role. EndUserAdmins are responsible for sending Campaigns. Basically they are the merchant's team members.

The Merchant receives on his/her email address the Welcome Email.



SMB - Reset Password page

Create Your Password button from the Welcome email leads to the Change Password page. New password should contain one of the special characters (@#\$%^&*!) and must be a minimum of 8 nonblank characters.

SMB - Automated Email after Changing the password

After Resetting the Password the merchant will receive an automated email with confirmation that the password was successfully reset.



SMB - LogIn Page

After Resetting the Password the merchant is taken to the LogIn page. Here you can

- Login with credentials (log in was sent via email, and password from reset password);
- Request to reset password.

Heartland Email Marketing	
 SIMPLE SECURE FAST. Marketing designed to meet the unique designed t	Welcome to Email Marketing! Login to your account Personnen: Personnen: Personnen: Personnen: Personnen: Personnen: Personn
Copyright © 2008-3019 Heartand, Inc. Heartand is a segatement Fademark of Global Payments Inc. All Rights Reser	ved Version t0.0.2

SMB - Contacts (Default Page for EndUserAdmin)

Once login was successful - you are being taken to the Segmentation Dashboard - default page for EndUserAdmin.

Heartland Email Marketing 💧 Contacts 📲 Reports 🔧 Too	is 🌞 Settings						PauLEUA Largout Contact Search
Total Estimated Count: 0	Send Campaign						
Segmentation Dashboard	Group Count is 0			Clear Gro	up + -	Saved Segmenta	tions
Search for field	Quick search or drag field	s here				Select to	Save Segmentation
First Name Last Name Title Gender	1						
Address 1 Address 2 City State							
Zip Code Mobile Phone Home Phone							
Business Phone Email Prospect Source							
Assigned To Location Email Unsubscribe	Į						
Email Validated Bounce Assigned Location							
Contacts Created Timeline (Apr 1, 2018 - Feb 18, 2019)							🗂 ×
Aor May Jun Ju	Na	540	0a	Nov	Dec	Jan	Feb

Adding Contacts to Email Marketing

To send campaigns there should be customers. Customers can appear in the system by:

- Manual Adding;
- ► Import;
- Online Form.
- 1. Manual adding contacts.

a. View Contacts

Click **View Contacts** on the Segmentation Dashboard (**Contacts** tab). It accesses the Contacts List page.

Heartland Email Marketing 💧 Contacts 📢 Reports 🔧 Tools 🌣	: Settings			dmytra.EUA : Logeut Conlact Search
Total Estimated Count: 11 Refer Email View Contacts	Send Campaign			
Segmentation Dashboard	Group Count is 0		Clear Group + -	Saved Segmentations
Search for field	Quick search or drag fields here			Select to Save Segmentation
First Name Last Name Title Gender				paul test 5/3/2018 16:52 P
Address 1 Address 2 City State Zip Code				
Mobile Phone Home Phone Business Phone				
Email Prospect Source Assigned To				
Location Email Unsubscribe Email Validated				
Bounce Assigned Location Assigned DMA				
Contacts Created Timeline (Jan 16, 2019 - Feb 15, 2019) 6				≞ ×
			62/05/2019	
2				2
Jan 17 Jan 24		Jan 31	Counts: 0 Wb 7	Feb 14
		Capyrigh	0 2009-2019 Heartland, Inc. Heartland is a regis	stand trademark of Global Paymenta Inc. All Rights Reserved. Version 8:15

b. Add a New Contact Button

On the Contacts List page you can create a new Contact Record. Click **Add a New Contact**. It accesses the Contact Details page.

Add is New Cor
Date Created 🕶
Feb 8 2019 05:05:12 AM 🔗 📋
Jan 29 2019 01:41:17 PM 🛷 🖨
Jan 28 2019 04:51:17 PM 🥒 🗎
Jan 28 2019 04:51:17 PM 🛷 📋
Jan 28 2019 04:51:17 PM 🥒 😭
Jan 16 2019 09:18:47 AM 🥒 👘
Dec 18 2018 02:37:04 PM
Dec 5 2018 05:47:36 PM 🥒 😥
Oct. 11 2018 09:32:27 AM
Sep 12 2018 11:16:25 AM
Jul 11 2016 11:41:26 AM 🖉 🗑
Apr 23 2018 01:28:08 PM
Apr 19 2018 12:31:47 PM

c. Form to Create a New Contact

To create a contact, you must fill all of the mandatory fields:

- ► First Name
- Last Name
- Email
- Select prospect type

Any other field if it is real information can be filled as well. And also check for the Notification Preferences Email Opt-In to be enabled. Than the contact can be saved.

land Email Marketing 💧 🌢	Contacts 👔 Reports 🔧 Tools 苯 Settin	28		dmytro.EUA Logout Contact Search
CONTACT INFORMATION First Name Title	Mddle Initial	Last Name -	NOTIFICATION PR Email © Email Unsubsort © Email Optim © Email Optim	be
Address Address One				
City	Select/Type a Stat			
United States	• O Addre	ss Delivery Failure		
Phone				
Motile Phone Home Phone				
Business Phone		Ext		
Birthday n=-yyyy	Gender -Sete	ci a Gender		
Prospect Type"	Contact	Source		
-Select a Proipect Type-	-5(%	(Le Diurpe-		
Assigned To	Location			
dmytro.lypovets	•			
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2. Importing Feature

a. Import Page

To proceed with bulk contacts unboarding - go to Tools -> Import. To import contacts to the system you need to have a .csv file with contacts information: First Name, Last Name, Email, and so on.

Files could be uploaded by:

- > Drag-and-drop files from the folder to the browser;
- Clicking on the button Drop File and select file on the computer.

Heartland Email Marketing	🛔 Contacts 👥 Reports 🔨 Tools 🗮 Retifugs	dmytro_EUA Logmit Contact Search
Heartland Email Marketing	Contract Market Contract Contr	
	Capanga & 1000 2014 Annotati ya kukukuti ya kupana kukukuti ya kukukuti ya kukukuti ya kupana kukukuti ya kupa	

b. Selecting mapping fields

Once file was selected the importing tool will suggest to map information from .csv files to existing fields for Contacts. To proceed with import you have to be sure that any column was mapped to the specific field for the Contact.

If the Import Tool did not find the proper field to map to - you can select it from the dropdown (you can type the name for filtration).

his is a preview of what your document will look like. Please continu	ue to the maxt step to complete your import.	Cancel
First_name ×	Last_Name ×	email_address ×
Select an Option	* Select an Option	* Select an Option
Please remove this field in order to proceed with the import.	Please remove this field in order to proceed with the import.	Please remove this field in order to proceed with the import.
Test	Testio	test.testio2test.com
Dmytro	Lypovets	dmytro.lypovets@dev-pro.net
fest	Testio	test.testio2test.com
Omytro	Lypovets	dmytro.lypovets@dev-pro.net
fest	Testio	test.testio2test.com
Dmytro	Lypovets	dmytra.lypovets@dev-pro.net

c. Pop-up

When all of the fields were matched to the specific field in the Contact - the Import button enables.

Upon clicking on the Import button a More Information Required! Pop-up appears. Here you can choose to:

- **1** The first radio button group:
 - Generate a new Source of import (by default the name is the local day);
 - Generate Source will re-generate the name;
 - Select from current sources a dropdown with all sources (basically sources that were used before);
- 2 The second radio button group:
 - Overwrite current records in the CRM will fully update contacts, that match each other by First and Last names;
 - Do not include First/Last name in the import will updates contacts, that match each other, but will not update First and Last name.

To proceed with import, click the **Start Import** button.

More Information Required!	ж
Create a new source Import_02.15.2019_02.00 Generate Source	
◯ Select from current sources	
Click to select	
Merging first/last name will overwrite currently saved first/last names in the CRM. What would you like to do Overwrite current records in the CRM Do not include first/last name in this import	
Start Import Ca	incel

d. Completed

Upon clicking **Start Import**, the Data Import/History page opens. Here you can see the import progress. Once the import is complete, it shows the "Complete" status in the Status column.

Active Imports						Start New Import
iob Id	Filename	Date	Total Records	User	Status	Info
573	Test_Book.csv	Feb 15, 2019 7:04 AM	6/6	DL_Test_BSI_Admin	- Complete	inta
44	TestCSV.csv	Mar 23, 2018 2:54 PM	0/3	bao.ho	NWS.	into
143	Test/CSV.csv	Mar 23, 2018 2:52 PM	0/3	bao.ho	- INFS.	into
142	TestCSV.csv	Mar 23, 2018 2:45 PM	0/3	bao ho		into
i41	TestCSV.csv	Mar 23, 2018 2:22 PM	0/3	bao.ho	-	- Info
Completed Imp	orts					
Job Id	Filename	Date	Records Imported	User	Status	Info
523	7626-ENT.csv	Nov 21, 2018 9:48 AM	2	Sindoori.EndUser	✓ Complete	into
023	TestCSV.csv_original.csv	Jun 21, 2018 5:17 PM	5 T.	bao.ho	✓ Complete	inte
022	TestCSV.csv_original.csv	Jun 21, 2018 5:07 PM	1	bao.ho	V Complete	into -
	TestCSV.csv_original.csv	Jun 21, 2018 5:06 PM	t	bao.ho	✓ Complete	into
021		12001201201201201	4	Sindoori.Admin	✓ Complete	into
55	7626-SMB.csv	May 15, 2018 4:18 PM				

e. Info

To see more information about the import, click **Info**. Clicking the **Info** button shows a Status pop-up window. Here you can:

- > Download records with errors will download a .csv file with contact and its error;
- Download successful records will download a .csv file with successfully imported contacts in the format they are storing in the database right now;
- > Download your original file will download the original .csv import file;

- Changes to the existing contacts:
 - o Contacts Updated shows the counter;
 - o Import Successful shows the counter;
 - Duplicates found shows the counter.

Filename	Date	Total Records	User	Status	Info
Test_Book.csv	Feb 15, 2019 7:04 AM	6/6	DL_Test_BSI_Admin	✓ Complete	
TestCSV.csv	Mar 23, 2018 2:54 PM	0/3	bao.ho		E
TestCSV.csv Status				×	Ľ
TestCSV.csv 4	Contacts Updated			14475	C
2 TestCSV.csv	Imported Successfully			NAME.	
🗅 Down	load your original file.				
	load successful records.				
Filename	load records with errors.				Info
7626-ENT.csv	ioad records with errors.			omplete	
TestCSV.csv_orig				OK omplete	C
TestCSV.csv_original.csv	Jun 21, 2018 5:07 PM	1	bao.ho	Complete	E
TestCSV.csv_original.csv	Jun 21, 2018 5:06 PM	1	bao.ho	✓ Complete	C

3. Online Forms

One of the ways to get user to the system - is through Online Forms. They can be adjusted to the 3rd party systems, or share like a direct link to the form.

a. Manage Forms

To create or share a link to the form you need to go to the Tools section -> Manage Forms.

Here is the list of forms - Form Builder List. Here you can:

- Copy a Link will copy a direct link to the form to your clipboard;
- Copy Code will copy the iframe code to the form to your clipboard;
- Edit will open a Form Builder page to edit;
- **Delete** will open a pop-up to confirm deleting.

Heartland Email Marketing	🛔 Contacts 🚮 Reports 🔦 Tools 🌞 Betlings	dmytra.EUA Legent Contact Search
Email Template O	Form Builder List	
Contact Tools O		Add a New Form
Import	Form Name	
Form Builder	test	% ᠿ # ≘
Manage Forms	tai \$1 Torrin	ବ ମ୍ବ <i>କ</i> କ
POS Configuration		
Manage Coupons		
1		
		Crepylight © 2009-2019 Heartland, Inc. Heartland is a registered trademark of Global Payments Inc. All Rights Reserved, Version 8.15

b. Form Builder

Upon clicking on the Add a New Form button you are getting to the Form Builder page. Form builder is intended to create your own version of online form to onboard new contacts to the CRM. It requires to:

- Enter a Form Name;
- Choose a Layout:
 - o 2 Columns (selected by default);
 - o 1 Column;
- Choose a theme:
 - Light Theme (selected by default);
 - o Dark Theme;

All other modifications are optional.

The default form provides you with 3 default fields that is enough to onboard a contact:

- ► First Name;
- Last Name;
- ► Email;

And also 2 checkboxes (they are not modified).

Form customization:

- Adding a Logo:
 - Click on the field to open a dialog window;
 - Drag-and-drop to the browser;
- Enable/Disable custom subtitle;
- > Add more fields to the form via drag-and-drop from the search fields list;
- Edit the name of the Submit button.

nail Template O	Form Builder Editor			
ontact Tools O	Form Information	collapse 🕥	ſ	Drop Logo here or click to upload.
rm Builder O	Form Name*			
Aanage Forms	Form Layout*		Form Subtitle	
OS Configuration			Tell us about yourself! We'll send you awesome updates	
Manage Coupons	•		* First Name	Options * Last Name
	Themes" Custom CSS	Custom JS	Text Input	Text Input
	Light theme	Add JS	* Email	Options
	* Statistics a required heat		Test lepsi	
	Select Fields			
			* 1 am 13 years of age or older	
			* I agree to receive email messages from San Franci	Company, 123 San Francisco Drive, San Francisco, California 12345, United States
	First Name Title Gender			Edit Yes
	Address 1 Address 2 City Country	State	Drag-and-drop	Scome
	Zp Code Mobile Phone Home Phone		* indicates a required field	
			insolutions is required times	
	Business Phone Email Location Birth	nüay		

• Configure the field

For all added fields to the form it is possible to change the title.

For non-default fields from options it is possible to mark them as "Required" to submit the form.

Form Subtitle		
Tell us about yourself! We'll send you awesome updates.		
* First Name	* Last Name	Options
Text Input	Text Input	
* Email	Birthday	Options Delete
Text Input	1	ear 🗘
□ I am 13 years of age or older	Display Name	Birthday
I agree to receive email messages from San Francisco Company, 123 San Francis		C Required
Submi	t	

* indicates a required field

c. Getting online forms

To view the Online Form, click **Copy Link**. The link will be copied to your clipboard. You can paste it into a new browser window and review the form.

Examil Marketing Imail Tarsplate Form Builder Lister Form Builder Lister Imail Tarsplate Imail Tarsplate Form Builder Lister Imail Tarsplate Imail Tarsplate <	Control Elevent Add a Heren For මං දි2 ♪ ම මං දි2 ♪ ම මං දි2 ♪ ම ම
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E Atal Templates POINT Dullidel Car Contact Tools 0 Import Form Bailder Form Bailder 0 Manage Form Inst POS Configuration 0 Test_Form	ବ୍ତ ମ୍ପି ୶ ଶ ବ୍ତ ମ୍ପି ୶ ଶ
Contact Tools • Import • Form Builder • Interge Forms •	ବ୍ତ ମ୍ପି ୶ ଶ ବ୍ତ ମ୍ପି ୶ ଶ
Import John Name Form Builder Inst Mennigs Forms Inst form POS Configuration Test_Form	ବ୍ତ ମ୍ପି ୶ ଶ ବ୍ତ ମ୍ପି ୶ ଶ
Form Builder of Inst Storage Forms	% 42 🖋 📋
Manage Forme Lest form POS Configuration Test, Form	% 42 🖋 📋
POS Configuration O Test, Form	
	0428
Cepynght 0.2006-2019 Heartfand, Brit. Heartfand Is a naghdeinad traubh	erk of Global Paymenta Inc. All Rights Reserved, Version 8.1
Name * Last Name *	
* Birthday *	
Month 5 Year 2	
MUNITY + 1987 +	
am 13 years of age or older agree to receive email messages from San Francisco Company, 123 San Francisco. Drive, San Francisco, California 12345, United States	

Create a Master Template

To create a new master Email Template, go through the send campaign flow and make edits, then proceed to the campaign details page and select **Publish Template Only**, doing this will make the template a master template, and it will be available in the Send Campaign flow as a template to send:

	Citch was fasts sant set the measure
nplate Settings	
	Create Template/Campaign
plate Background	
	Send Me A Copy
	By checking this bot the email address associated with your user account will receive a test email within 15-20 minutes. Your guests will receive this email at the scheduled sent after and time. It is best practice to set up your emails a day or two in advance (at a minimum, 2 hours prior in advance) that way, if needed, you can delete your scheduled sent there is something that needs to be changed after seeing your test email come through.
	Template Name*
	BST - 4957 - Bar Pub - Paul EndUserAdminSF - Paul EndUserAdminSF
	Characters left: 36
	Subject*
	Happy Tuesdayt 😰 🖬
	Characters Iott: 81
	Display Name*
	San Francisco Company
	Preheader 🕢
	Just for you
	Characters left: 88
	From Email*
	noreply@mta1xenial.com
	Schedule For Now Schedule For Later
	* Indicates a required field Publish Template Only Publish Campaign Cancel

You can also select the **Publish Campaign** button to actually send the campaign out to you desired contacts, and you will be prompted and asked if you would like to make the template a Master Template.

	Schedule For Now	Schedule For Later	
Once you have select Date	Do you want to make this template a Master Template?	×	
02/26/2019	Making a temptate a "Master Temptate" allows you to reuse the temptate again at another time.	Yes	-

Email Templates

Access Tools section -> E-Mail Templates tab.

1 Email Templates List.

E-Mail Template	Email Templates List						
Campaign Automation	Q. Search Templates	Search Reset Sea	rch				Add a New Email Template
Campaign Automation	Total Template Count: 101						
Contact Tools 0	Template ID 💌	Template Name	Update Date	User Name	Subject	Master Template	
Import	98010	Welcome - no coupon - dmytro.EUA	Feb 20 2019 6:16 AM	dmytro.EUA	Test_Cancel	No	4
Form Builder O	98009	Birthday - no coupon - dmytro.EUA	Feb 20 2019 5:25 AM	dmytro.EUA	Test_DL_Shceduled	No	ිට 🖋 🛱
Manage Forms	97857	Welcome - with coupon - Paul.EndUserAdminSF	Feb 18 2019 1:51 PM	Paul.EndUserAdminSF	Thank you for joining! 🎉	No	42 €
POS Configuration	97856	Anniversary - with coupon - Paul.EndUserAdminSF	Feb 18 2019 1:44 PM	Paul.EndUserAdminSF	Thank you for an amazing yeart 🍳	No	<2 / ₿
Manage Coupons	97855	Birthday - with coupon - Paul EndUserAdminSF	Feb 18 2019 1:24 PM	Paul EndUserAdminSE	Happy Birthdayt 🏯	No	Q # 8
	97178	Dealer Email Marketing Template - DL_Test_SF_Partner	Feb 11 2019 5:43 AM	OL_Test_SF_Pariner	Test dealer	Yes	<2 € 8
	96902	Birthday - with coupon - Paul.EndUserAdminSF	Feb 8 2019 4:57 AM	Paul EndUserAdminSF	Test	Yes	<2 € 8
	96101	Birthday - with coupon	Jan 29 2019 3:26 PM	Paul EndUserAdminSF	Happy Birthdayt 🐣	Yes	42 € 8
	96100	Birthday - no coupon	Jan 29 2019 3:25 PM	Paul EndUserAdminSF	Happy Birthday! 😁	Yes	200
	96097	Anniversary - no coupon	Jan 29 2019 1:51 PM	Paul EndUserAdmin5F	Thank you for an amazing yeart 🍳	Yes	200
	96096	Anniversary - with coupon	Jan 29 2019 1:50 PM	Paul EndUserAdminSP	Thank you for an amazing yeart 🍳	Yes	21
	95878	Welcome - no coupon	Jan 28 2019 5:06 PM	Paul EndUserAdmin5F	Welcome to our program IV	Yes.	20
	95876	Welcome - with coupon	Jan 26 2019 5:06 PM	Paul EndUserAdminSF	Welcome to our program!	Yes	21
	95274	Guest List, rev2019 [N DEV, QA]	Jan 18 2019 5:02 PM	Michael enduser	Subject Line Goes Here	Yes	<2 € 8
	95116	Email Marketing, rev2019 BN DEV,	Jan 18 2019 5:02 PM	Michael enduser	Subject Line Goes Here	Yes	200

Here you'll find the Email Templates List. This list consists of Master Templates and all Email Templates that were made during the Send Campaign Flow. Here you can:

- Add a New Email Template;
- Clone a template;
- ► Edit;
- Delete.
- 2 Add a New Email Template.

leartland Email Marketing	🛔 Contacts 📲 Reports	🔧 Tools 🛛 🌞 Settings					dmytro.EUA Legout Contact Search
Email Template O E-Mail Templates Campaign Automation O Campaign Automation	Email Templates List Q. Search Templates Total Template Count: 101	Search Reset Sear					Add a New Ernail Template
Contact Tools O	Template ID ¥ 98010	Template Name Welcome - no coupon - dmytro.EUA	Update Date Feb 20 2019 6:16 AM	dinytro.EUA	Subject Test_Cancel	Master Template	<2 ≠ ≘
Heartland Email Marketing	🛔 Contacts 📲 Reports	🔧 Tools 🛛 🌞 Bettings					dmytro.EUA Logout
E-Mail Template O E-Mail Templates Campaign Automation O	Template Settings Template Name Display Name			Subject Charactern left From Addr		7	
Campaign Automation Contact Tools O Import	Proheader () Charachers left: 100	imil		Piele Text		Provine	
Form Builder O Manage Forms POS Configuration O							
Manage Coupons							
							1
					⊡ Maste	e Tempiate Send Test Campeign/	mal See Carcel

On this page you need to fill all of the top fields:

- Template Name;
- Display Name;
- Subject. Subject can include Emojis;
- Select a From Address from the drop-down (if several of them were added by the Sales_Operations)

You can create a template by entering a custom HTML code.

To make this template appear in the list of templates during the Send Campaign Flow you need to hit a checkmark Master Template.

Segmentation Dashboard

Segmentation Basics

To define your audience, that should receive the particular campaign or just to filter contacts you need to make a filtration for them. It could be done through Segmentation Dashboard.

Heartland Email Marketing	Reports 🔧 Tools 🍁 Settings		dmytro.EUA Logout Contact Search
Total Estimated Count: 11 🔳 Adive Em	all View Contacts Send Campaign		
Segmentation Dashboard	Group Count is 0	Clear Group 🛨 -	Saved Segmentations
Search for field	Quick search or drag fields here		Select to Save Segmentation
			paul test 5/3/2018 16:52
First Name Last Name Title Gender Address 1 Address 2			
Gender Address 1 Address 2 City State Zip Code	1		
Mobile Phone Home Phone			
Contacts Created Timeline (Jan 20, 2019 - Feb 19, 2019)) 5		⊨ ×
Ϊ Â			
2			2
Jan 24	Jan 31	Feb 7	Feb 14
		Copyright © 2019-2019 Heartand, Inc. Heartland is a registered trademan	of Global Payments Inc. All Pights Reserved. Version 10.0.5

You can add segmentation by:

- Clicking on the exact segmentation;
- Drag-and-drop the segmentation to the search field.

It will show a pop-up to add a filtration query and update the Total Estimate Count.

Heartland Email Marketing	ts 📲 Reports 🔧 Tools 🌞 Settings			dmytro.EUA Legeut Contact Search
Total Estimated Count: 0	Active Email View Contacts Send Campaign			
Segmentation Dashboard	Group Count is 0		Clear Group 🕂 🗕	Saved Segmentations
Search for field	Eirst Name : × Drag fie	ilds here		Select to Save Segmentation
First Name Last Name Title	First Name * Search options =			paul test 5/3/2018 16:52
Gender Address 1 Address 2 City State Zip Code	* Top 10 display first.			
Mobile Phone Home Phone Contacts Created Timeline (Jan 20, 2019 - Feb	19, 2019) 5			🗂 ×
		02/04/2019		
				2
Jan 24	Jain 31	Counts: 0 Feb 7		Feb 14
		Copyright @ 2009-2019 Heart	and, Inc. Heartland is a regelered trademark	of Global Payments Inc. All Rights Reserved, Version 10.0.3

You can press the **View Contacts** button to open the Contacts List to see all of the contacts that match the query.

Q Search	Search	Reset Search			Add a New Contac
First Name	Last Name	E-Mail Address	Mobile Phone	Date Created 🔻	
Yana	Lohvinenko	yana.lohvinenko@dev-pro.net		Feb 8 2019 05:05:12 AM	a 🛍
Paul	DeStefano	paul.destefano@xenial.com		Jan 29 2019 01:41:17 PM	#
Paul	DeStefanooo	pjdestef3@yahoo.com	333-333-3333	Jan 28 2019 04:51:17 PM	ø 🛍
Paul	DeStefanooo	No segmentatio	n query 3333	Jan 28 2019 04:51:17 PM	e 🗇
Paul	DeStefanooo	pjdestef1@yahoo.com	333.333.3333	Jan 28 2019 04:51:17 PM	e 🗇
Paul	Testing	paul.destef@xenial.com		Jan 16 2019 09:18:47 AM	e 🗇
Paya	DeStefanolu	paul.destefano@e-hpss.com		Dec 18 2018 02:37:04 PM	e 🗇
Pausida	Deaf	pjdestef@xenail.com		Dec 5 2018 05:47:36 PM	e 🗇
Paul	DeStefano	pjdestel2@xenial.com		Oct 11 2018 09:32:27 AM	e 🗊
Paul	DeStefano	paul.destefano@xenial.com		Sep 12 2018 11:16:25 AM	e 🗊
Pausl	DesrTwsseano	Paul.DeStefanoqw@xenial.com		Jul 11 2018 11:41:28 AM	e 🗊
Paula	DeStefani	pjdestef1@xenial.com		Apr 23 2018 01:28:08 PM	e 🗇
Paula	DeStefani	pjdestef@xenial.com		Apr 19 2018 12:31:47 PM	ar 🔟

Q, Search	Search	leset Search			Add a New Conta
First Name	Last Name	E-Mail Address	Mobile Phone	Date Created 🔻	
Paul	DeStefano	paul.destefano@xenial.com		Jan 29 2019 01:41:17 PM	A 🗎
Paul	DeStefancoo	pjdestef3@yahoo.com	333-333-3333	Jan 28 2019 04:51:17 PM	A 🖻
Paul	DeStefanooo	With segmenta	tion query	Jan 28 2019 04:51:17 PM	e 🗇
Paul	DeStefanooo	pjdestef1@yahoo.com	333.333.3333	Jan 28 2019 04:51:17 PM	a 🗊
Paul	Testing	paul.destef@xenial.com		Jan 16 2019 09:18:47 AM	e 🗊
Paul	DeStefano	pjdestef2@xenial.com		Oct 11 2018 09:32:27 AM	d 🖻
Paul	DeStefano	paul.destefano@xenial.com		Sep 12 2018 11:16:25 AM	a 🛍

Multiple Segmentations

To proceed with more optional filtration you can create advanced segmentation preferences. It will show results that match either one or another query.

To add "Or" segmentation field - press a "+" button.

You can have numerous amount of such segmentation options.

tal Estimated Count: 8 🔳 Active	Email View Contacts Send Campaign	= = =	
Segmentation Dashboard	Group Count is 7	Clear Group + -	Saved Segmentations
Search for field	First Name : paul X Drag fields here		Select to Save Segmentation
	OF		Auto-saved 2/19/2019 17:15
First Name Last Name Title Gender Address 1 Address 2	Group Count is 1	Clear Group + -	• paul test 5/3/2018 16:52
City State Zip Code Mobile Phone Home Phone	Last Name : lohvinenko 🗙 Orag fields he		
tacts Created Timeline (Jan 20, 2019 - Feb 19,	2019) 5		m
Jan 24	Jan 31	Feb 7	Feb 14

You can save different segmentations for later users by clicking Select to Save Segmentation.

eartland Email Marketing	👖 Reports 🔧 Tools 🏾 🌞 Settings		dmytro.EUA Logout Contact Search
Total Estimated Count: 8	Email View Contacts Send Campaign		
Segmentation Dashboard	Group Count is 7	Clear Group 🕂	- Saved Segmentations
Search for field	First Name : paul X Drag fields here		Select to Save Segmentation
First Name Last Name Title	Group Count is 1	Or Clear Group + •	Name Xame X
Gender Address 1 Address 2 City State Zip Code	Last Name : lohvinenko × Orag fiel		Make segmentation available to all users within company
Contacts Created Timeline (Jan 20, 2019 - Feb 19, 2	2019) 5		⇔ ×
			2
Jun 24	Jan 31	Feb1	Fab 14
		pyright © 2009-2018 Heartland, Inc. Heartland is a regelered tradem	ark of Global Payments Inc. All Plattis Reserved, Version 10.0.5

Send Campaign Flow

Step 1. Select a Template

After you've made a preferable segmentation, you can send a campaign to the segmented audience. To send a campaign, go to **Contacts** tab -> **Send Campaign** button.

Heartland Email Marketing 🛔 Contacts 🚮 Reports 🔧 Tools 🗱 Settings	dmytro.Et	UA Logout Contact Search
Total Estimated Count: 11 🔳 Active Email View Contacts Send Campa	aign	
Segmentation Dashboard Group Count is 0	Clear Group + - Saved Segmen	
Search for field	Pare Select to Sav paul test 5/3/2018 1652	ve Segmentation
First Name Last Name Title Gender Address 1 Address 2	and a room t	
City State Zip Code		
Mobile Phone Home Phone Contacts Created Timeline (Jan 20, 2019 - Feb 19, 2019)		🗂 ×
		2
den 24 den 31	Feb 7 Feb 14	
		enerved, Version 10.0.3
Heartland Email Marketing 🛔 Contacts 👖 Reports 🔧 Tools 🌞 Settings		Contact Search
Total Template Count: 57	se a Template:	🔶 Back
	se a remplate.	← Back
Dealer Email Marketing Template - DL_Test_SF_Partner Template ID: 97178 Template Subject: Test dealer Last Update: Feb 11 2019 5:43 AM	Birthday - with coupon - Paul.EndUserAdminSF Template ID: 96902 Template Subject: Test Last Update: Feb 8 2019 4:57 AM	
Birthday - with coupon Template ID: 96101 Template Subject: Happy Birthday! C Last Update: Jan 29 2019 3:26 PM	Birthday - no coupon Template ID: 96100 Template Subject: Happy Birthday!	
Anniversary - no coupon Template ID: 96097 Template Subject: Thank you for an amazing year! • Last Update: Jan 29 2019 1:51 PM	Anniversary - with coupon Template ID: 96096 Template Subject: Thank you for an amazing yearl • Last Update: Jan 29 2019 1:50 PM	

It will prompt you to the Choose a Template page. Templates are the master Templates created on the **E-Mail Templates** tab as a Master template, but you can make edits to customize it for each particular campaign.

By selecting the suitable template, it is prompting you to the next step.

Step 2. Edit a Template

Edit Template page allows to make edits to the selected template.

1 Change the Background color. You can change the template background color.



2 Edit images in the template. You need to press on the **pencil** button on the existing image and it will open a pop-up to upload new image, or use previously uploaded one.

Heartland Email Marketing	🛔 Gentacta 📢 Raporta 🔦 Toota 🌞 Bettrops		depteraBUA temperature Contact Search
Template Settings		Calls have If you can't are the message Kat's Confree	8
		550 × 300 me	8
		Thank you for joining us! You are note any to metative too tabled data and offers, showed entrying its your block. We load wards to saming you wood?	ŝ
		Follow Us Here	
Heartland Email Marketing Manage Asset Catego Add Asset Category:	🛔 Contacts 🚮 Paparis 🤨 Tools 🌩 Bettings pries		dagana dan dalah karan bar dalam karan karan dalam dagan dalam dagan dalah karan dalam dagan dalam dagan dalam dagan dalam dagan d
Rans" Enter & new talligary Categories Int. Nase			Actions
In a			Transformation (Contractance)
			Cancel

• Manage Assets. Will open a page with previously uploaded images to this Asset Category.

Heartland Email Marketing	6mpter EUA Laurant Contact Search
Manage Assets	Back to Asset Categories
Category: East Size: ELC	Search by Flename or Username
Manage Assets Category: I Size: I C Thumbnail View Return 2019d-145 43132.prg	Results Per Page: 20 1
Kute	motous 1 Next +
	Cancel Opupped 6.2009-2009 Namebook vic, Namberd is a suppress Systematic Vibrard Revenues to: All Sparis Newsel (Nami 1911) 2

• **Upload Assets**. Will allow to upload new files to the Asset Group to use them either for this particular Email Campaign, or future ones. Upload is triggered by clicking **Upload Files**.

and Email Marketing 🛔 Contacts 🚮 Reports 🔧 Tools 🗱 Settings		dmytro.EUA Legent Contact Search
sset Uploader kload Category: saat		Eack to Asset Categor
Upload Your Files		
Choose Files No file chosen		Upload files
	Drag and Drop	
Upload Preview		
		Cano

3 Edit Text. You can edit any text block by clicking on the pencil button in the middle of the block. It will open a pop-up with HTML Text Editor, where you can edit: Text Heading, Font, Font Size, Font Color, Font Layout, add bullet points, etc.

ct						
Heading 1	+ Font Family	Font Size	- B	<u>u</u>	<u>A</u> • 🛤	1:3
Πατικ	you for	Jonnig	y us:			

4 Edit Coupons. You can edit a coupon block by clicking on the **pencil** button in the middle. It will open a pop-up. So you need to choose from active coupons to adjust it to the Template. You can find how to create a coupon in the SMB - Manage Coupons.

Select coupon		
Please select coupon from the list Select Coupon		
	Save Cancel	

5 Edit Links. You can edit a link block by clicking on the **pencil** button in the middle. It will open a popup to enter a link title and the URL.

Edit Link		
Title*		
Follow Us		
URL*		
https://www.facebook.com		
* indicates a required field	Save	Cancel

Step 3. Schedule the Campaign

When the template editing is done, to proceed to the next step the **Create** button should be pressed.

It will open a pop-up with scheduling preferences.

Heartland Email Marketing	🛔 Contacts 👔 Beports 🔦 Tools 🌩 Bettings	1	dmytro.EUA Legent Contact Search
Template Settings	Olick here it you can't see the message		0
- Template Background	Kat's Coffee	窗	
	and the second se		
	Welcome	Ē	
	Thank you for joining us! You are now ready to receive our literat deals and offers, delevered straight to your lihoor. We look newsel to seeing you soon!	Ê	
	Follow Us Here	ê	
	Counter & 2005 2013 Personnels, Inc. Hearterst	a studietical fra deservation	Create Cancel
Heartland Email Marketing	🛔 Cantanta 👔 Ropurta 🦄 Tanta 🗱 Settinga		dmytro.EUA Legent Contact Search
Template Settings			0
- Template Rectignated	Create Template/Campaign		
	Bend Mir A Copy By checking this for the email address associated with your user account will receive a test email within 15-20 minutes. Your guests will receive this email at the sch best practice to sub up your emails a day or hos in advance (at a minimum, 2 hours prior in advance) that way. If needed, you can delete your scheduled send if the be charged after seeing your test email come through. Template Name* (Witcome with coupon - dmytrs.EUA	eduled send date and time re is something that needs	R
	Characters left: 66 Subject"		
	Characters kelt: 100 Display Name*		0
	San Francisco Company Preheader		
	Just for you Characters left: 88		
	From Email* orephytightal:senial.com		
	Scheduli For Nov Scheduli For Later		
	* Indicates a required field Publish Template Cmly P	Cancel Campaign	*

Here you should fill the mandatory fields to proceed:

- > Template Name* is a mandatory field. Template name would be displayed in Reports;
- Subject* is a mandatory field. Would be displayed as a Subject line for the end user, who will
 receive the campaign;
- Display Name* is a mandatory field. Would be displayed as from whom the email was sent for the end user, who will receive the campaign;
- Preheader. Would be displayed as text after the subject line in the inbox of the end user, who will
 receive the campaign;
- From Email* is a mandatory and not editable field. Will show the Email, from what the Campaign was sent.

Than you need to schedule the campaign to be executed at a certain time:

- > Schedule For Now Execution would be processed in 5 mins from now;
- Schedule For Later Execution time and date are custom, but later, that in 5 mins from now. You should choose a date, time and time zone to count:

	Schedule For Now Schedule For Later				
C	Once you have selected a Date & Time, you will need to confirm your campaign by clicking "Publish Campaign" below.				
1	Date	Time	Time Zone		
	Select a date 🔻	Select a time 🔻	Eastern Time Zone 👻		

When you are done with scheduling procedure you can select from further actions:

- Publish Template Only button it will save the created template to Tool section Email Templates tab;
- **Publish Campaign** button will save the Template and put the Campaign to the scheduled execution and can be accessed from the Reports page.

Automated Campaigns

To access the Campaign Automation page you need to go to **Tools** section -> **Campaign Automation** tab.

				_			Paul.EndUserAdminSF Logout
and Email Marl	keting	Contacts	a 💼 Re	ports	Tools 🗱	Settings	Contact Search
		_	1	/			
Email Template	0	Manage G	ampaig	n Auton	nation		
E-Mail Templates		Enhance your o	core Email	Marketing	program with a	utomated messages and offers designed to keep your customers	
Campaign Automatic	on O	eogaged outsid	le of the sto	ore. This h	elps you to impr	ove customer's experience with your brand.	
Cempeign Autometics	-	Automated (Campaig	ins ⊕			
Contact Tools	0	Anniversary	0	(S)	Q		
Import		Birthday	0		Q.		
Form Builder	0	Welcome	0				
Manage Forms							
POS Configuration	0						Email Preview
Manage Coupons							Q

To start, hover over all tool tips to get familiar with the different automated campaigns available.

• Slide on the automated campaign you wish to setup and you will be taken to the next step.

Email Template	0	Manage Ca	ampaign Automation
E-Mail Templates			ore Email Marketing program with automated messages and offers designed to keep your customers engaged outside elos you to improve customer's experience with your brand.
Campaign Automatio	n O		
Campaign Automation	3	Automated C	The birthday campaign is automated to send out to contacts on the first of their
Contact Tools	0	Anniversary	ibithday month. For any contacts that signup for your email
Import		Birthday	marketing program and it happens to be their birthday
Form Builder	0	Welcome	month, don't worry! This automated campaign will also run at the end of each month to make
Manage Forms			sure these contacts also receive their birthday message
POS Configuration	0		
Manage Coupons			

Step 1: Select a Template

Select a template to use for your automated campaign, and select the Next button

Campaign Automation O Create Campaign. Step 1 of 3: Choose a Template	
Campaign Automation	
Contact Tools O Contact Tools O Reset Search Reset Search	
Import Total Templates Count: 3	
Form Builder O Birthday - with coupon - Paul.EndUserAdminSF	Birthday - with coupon
Manage Forms Template Type: Single Panel	Template Type: Single Panel
POS Configuration	
Manage Coupons	
	Selected
Birthday - no coupon	
Template Type: Single Panel	

Step 2. Edit a Template

• Edit the template by adding text, images, or social media links to customize it to your liking:



Step 3: Activate an Automated Campaign

• Confirm your subject line, display name, etc. and Activate your campaign:

🛔 Contacts 💼 Reports 🔧 Tools 🗱 Settings							
🗲 Back					Select	: >	Edit
Create Campaign. Step 3 of 3: Activate							
Subject *							
Happy Birthday! 😁 🎉							ÐC
							80
Displayed Name *		9	è.	4	4		
Paul's Pizza Shop	Se	arch					
Preheader O	-	-					
Just for you on your special day!			-				
Characters left: 67 From Email *			ě	ě			ē
noreply@mta1.xenial.com	- 6			0			
Constraint (Constraint Constraint)				0	0		
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- Once you setup your automated campaign, you will be sent to the Manage Campaign where you can
 preview your campaign, edit it, or turn it off completely
- Preview the campaign details and template by selecting the magnifying icon next to the campaign you wish to preview:

	Manage	Campaign	Autom	ation		Subject: Happy Birthdayl 😁 Display Name: San Francisco Company
E-Mail Templates					ited messages and offers designed to keep your customers ustomer's experience with your brand.	Preheader: Just for you From: noregiv@mta1.xenial.com
ampaign Automation		310/2 01 1212 340	ce, mains no	ps you to improve c	usioner a experimence was your scand.	Prom: norepygema i Aenaccom
Campelign Autometion	Automate	d Campaig	ns @			Click here if you can't see the message
ontact Tools	Anniversary	0		0.	0	
import	Birthday	0	ß	Q		Kat's Coffee
orm Builder	Welcome	Θ	08			
Manage Forms						
	0					
Manage Coupons						· · ·
						U ADDV DIDIUD AV
						HAPPY BIRTHDAY
						Wishing you the Best!
						We hope that your birthday is full of fun and adventure

• Edit the campaign by selecting the pencil / edit icon next to the campaign you wish to preview:

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and Email Marketing		
Email Template E-Mail Template E-Mail Template Campaign Automation Contact Tools Import Form Builder Manage Forms POS Configuration Manage Coupons	Manage Campaign Automation Enhance your one Email Murketing program with automated messages and offers designed to keep your customers engaged outside of the store. This helps you to improve customer's experience with your brand. Automated Campaigns o Anhiersary 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0	Biglight: Happy Bitthdayl (*) Biglight: Just for you Trimesder: Just for you Circle of you can't see the message Circle of you can't see the message Circl
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E-Mail Template C E-Mail Templates Campaign Automation	- Back	Contact Search Cancel Update
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Email Template C E-Mail Templates Campaign Automation C Contract Tools C Import Form Builder C Manage Forms POS Configuration C	Back Edit Campaign Email Template Binday - no coopon N0 - Coopon 02-26-2019 12-54 PM - Paul EndUserAdminSF Select Avadher Template Settings Subject Happy Binday1 © Select to choose another template Binday1 © Binday4 Name* San Francisco Company Probester Aut for you Characters Bit: 88 From Email*	context Baserd I template Context Proview Context Prov
Email Template C E-Mail Templates Campaign Automation C Contract Tools C Import Form Builder C Manage Forms POS Configuration C	Back Edit Campaign Email Template Binday - no coopon N0 - Coopon 02-26-2019 12-54 PM - Paul EndUserAdminSF Select Avadher Template Settings Subject Happy Binday1 © Select to choose another template Binday1 © Binday4 Name* San Francisco Company Probester Aut for you Characters Bit: 88 From Email*	t template Cickers & you can't see the message Cickers & you can't see the message
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E-Mail Templates Campaign Automation O Campaign Automation Contact Tools O Import Form Builder O Manage Forms POS Configuration O	Back Edit Campaign Email Template Binday - no coopon N0 - Coopon 02-26-2019 12-54 PM - Paul EndUserAdminSF Select Avadher Template Settings Subject Happy Binday1 © Select to choose another template Binday1 © Binday4 Name* San Francisco Company Probester Aut for you Characters Bit: 88 From Email*	t template t template Concert Concer
Email Template C E-Mail Templates Campaign Automation C Contract Tools C Import Form Builder C Manage Forms POS Configuration C	Back Edit Campaign Email Template Binday - no coopon N0 - 260-2019 12:54 PM - Paul EndUserAdminSF Select Avother Template Settings Subject Happy Binday1 © Bisplayed Name* San Francisco Company Proteader Aust for you Characters Bit: 88 From Email*	control terret t template Control t template Control

• Turn off your automated campaign by selecting the slider, you will be prompted to confirm that you really want to turn off the automated campaign:

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Reports

Reports page is intended to track the Scheduled Campaigns and already Executed Campaigns.

npaign Reports	Campaign R	leports							
s	cheduled Cam	paigns							
	V Campaign ID	E Campaign Name	E Scheduled 0	Date	Type	*	= Email	E Coupon	
	72045	dmytro.EUA - Test_DL_Shceduled	02/20/2019	Blast	dmytro.EU			= cospon	
Т		n stats will be processed in full and available for viewing one hour after you							
						Created By	Email	E Coupon	
	71955	Paul.EndUserAdminSF - Thank you for joining!	1	02/18/2019	Blast	Paul.EndUserAdminSF	~	_	
	71953	Paul.EndUserAdminSF - Thank you for an amazing year!	1	02/18/2019	Blast	Paul.EndUserAdminSF	~		
	71952	Paul.EndUserAdminSF - Happy Birthday!	2	02/18/2019	Blast	Paul.EndUserAdminSF	~	~	
	70130	Birthday - no coupon	11	01/29/2019	Blast	Paul.DeStefano	~		
	67597	Paul EndUser/IdminSF - have one on us	1	12/12/2018	Riast	Paul EndUserAdminSF			
	67504	Paul EndUserAdminSF - have one on us	1	12/12/2018	Blast	Paul EndUserAdminSF	-	-	
	65040	Paul PartnerTest - Have one on Usl	1	10/26/2018	Blast	Paul PartnerTest	-		
	64773	Paul EndUserAdminSF - Have one on us!	1	10/22/2018	Blest	Paul EndUserAdminSF	1	-	
	64136	Paul EndUserAdminSF - Welcomel Thank you for joining!	.1	10/11/2018	Blast	Paul EndUserAdminSF	-		
	64135	Paul EndUserAdminSF - Welcome! Thank you for Joining	1	10/11/2018	Blast	Paul EndUserAdmin&F	1		
	64110	Paul PartnerTest - Gift Cards Available for the Holiday's	18	10/11/2018	filent	Paul PartnerTest	-		
	64109	Paul PartnerTest - Have one on us!	2	10/11/2018	Biest	Paul PartnerText	~	1	
	64104	Paul EndUserAdminSP - Dealer Email Marketing	1	10/11/2018	Blast	Paul EndUserAdminSF	1		
	63895	Paul.PartnerTest - Enjoy One On Usl1	2	10/05/2018	Blast	Paul PatherTest	~	~	
	63885	Paul PartnerTest - Have another one on us!	1	10/06/2018	Blast	Paul PartnerTest	-		
	63875	Paul EndUserAdmixSF - Have one on ust	1	10/05/2018	Blest	Paul EndUserAdminSF	~		
	63364	Paul EndUserAdminSF - National Coffee Day = FREE for Reward	1	09/27/2018	Blast	Paul EndUserAdminSF	-	-	
	63286	Paul EndUserAdminSF - Come in and enjoy Salmon Saladal	1	09/26/2018	Blast	Paul EndUserAdminSF	-	_	
	61855	Paul EndUserAdminSF - Have one on usl	1	08/28/2018	Blast	Paul EndUserAdminSF	-	-	
	61304	Paul EndUserAdminSF - Enjoy one on usf	4	06/17/2018	Blast	Paul EndUsorAdminSF	-	-	
	61156	Paul EndUserAdminSF - Xenial Grille	1	06/15/2018	Blast	Paul EndUsorAdminSF	~		
	59615	Paul EndUserAdminSF - Enjoy one on ust	13	07/25/2018	Blast	Paul EndUserAdminSF	-	1	
	58560	Paul EndUserAdminSF - Enjoy one on sel Paul EndUserAdminSF - Enjoy one on sel	1	07/05/2018	Biast	Paul EndUserAdminSF		_	
	58545			07/05/2018	Blast	Paul EndUserAdminSF			

Opening Scheduled Campaigns:

						dmytro.EUA Logout
Heartland Email Marketing	🛔 Contacts 📲 Reports 🔧 Tools 📫 Settings					Contact Search
Campaign Reports O	Campaign Reports					
	Scheduled Campaigns					
	▼ Campaign ID				Created By	≣ Email ≣ Coupon ≣
	72045 dmytra.EUA - Test_RL_Shceduled		02/20/2019	Blast	dmytra.EUA	~
1	Executed Campaigns					
	The executed campaign stats will be processed in full and availab	ie for viewing one hour after your campaign	is sent.			
		r joining!	Statistics Execute 02/18/2		Type Created By Paul EndUserAdminSF	≣ Email ≣ Coupon ≣
	71955 Paul EndUserAdminSP - Thank four	r joining! 1	02/18/2	019 Blast	Paul.EndUserAdmin5P	dmytra.EUA : Legout
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Campaign Reports		V				
	Back to Campaign Reports	•			×	Cancel this Campaign 🖌 Edit this Campaign
	Your browser timezone is not supported, time is displayed in E	astern Time Zone				
	Created By: dmytro.EUA					
1	Campaign ID: 72045					
1	Date Created: 02/20/2019 5:25:10 AM EST					
	Last Updated: 02/20/2019 5:25:10 AM EST					
1	Scheduled Time: 02/20/2019 6:19:00 AM EST					
I	Actions:					
I						
	dmytre.EUA - Test_DL_Shceduled_Email Tempiane ID: 90009					
	Template					
	List Criteria:					
	Total Estimated Count: 1					
	Segmentation:	Group				
		Emeil : dmytro.lypovels@dev.pro.net	Enel_Optn:1 E	meil Unaubecribe : 0	Bounce : 0	
12				0	poligit il picco picco resoltanti, inc. inspitanti in a-	wellings balances of Parker Persons Inc. At Hidds Tensors' Version 17.2.2

From the Reports page you can review Scheduled Campaigns. Clicking on the scheduled campaign you can:

- **Cancel this Campaign**. Is only possible if campaign is scheduled to be executed for more than 45 minutes ahead. Cancel will open a confirmation pop-up.
- Edit this Campaign. Is only possible if campaign is scheduled to be executed for more than 45 minutes ahead. You can edit campaign name and execution time from the pop-up.

EDIT CAMPAIGN

dmyt	ro.EU/	A - Tes	st_Car	icel			02/21/2019 5:03:00 PM
hedu	led Da	ate*					Scheduled Time*
		Feb	ruary 2	2019			<u>^</u>
Su	Мо	Tu	We	Th	Fr	Sa	12 : 03 AM
27	28	29	30	31	01	02	· ·
03	04	05	06	07	80	09	Eastern Time Zone
10	11	12	13	14	15	16	Schedule for Now
17	18.	19	20	21	22	23	
24	25	26	27	28	01	02	Scheduled datetime in local(browser) timezone 02/22/2019 7:03:00 AM
03	04	05	06	07	08	09	

Opening Executed Campaigns



You can see stats from the campaign:

- General Stats;
- Email messages stats: Sent, Total Opens, Unique Opens, Unique Clicks, Bounced, Unsubscribed;
- Coupon stats: Sent, Redeemed.

Statistics is being updated when someone opens/unsubscribes, etc.

SMB - Manage Coupons

To access the page you need to go to **Tools** section -> Manage Coupons tab.

leartland Email Marketing	🛔 Contacts 👖 Repo	ts 🔧 Tools 🌣 Settings		droyfro. EUA Logout Contact Search
Email Template O E-Mail Templates Contact Tools O Import	Manage Coupons Status: Active			Add a New Coupon POS Credentials
Form Builder O	Couron Code	Coupon Name	Date	Total Days
Manage Forms		Start typing to filter		
POS Configuration	1122	\$5.00 Off Coupon	Apr 9, 2018	60 days Deactivate
Manage Coupons	123583	Free Beverages	May 3, 2018	60 days Deactivate
	5423	Free Dessert	Aug 17, 2018	30 days Deactivate
	34214	\$10.00 Off	Dec 12, 2018	90 days Deactivate
			Suppo 8 Junio	119 manuar (s. manuar s. majanat salawa sifasa Ayuwa ke al Tujis Rawad, Jawa 1, 1

Here you see the list of active coupons (by default). You can:

• Switch to view deactivated coupons.

Manage Coupons	
Status:	
otatus.	

- > Search for coupons in the list. The search works for Coupon Name field only;
- > Deactivate the coupon. Will remove coupon from the Active list and put it to the list of Inactive list;
- Edit the Coupon. You can edit only Total Active Days and Discount (% or Amount);

EDIT COUPON				
Coupon Name*				
\$5.00 Off Coupon				
Coupon Code*		Total	Active Days*	
1122		60		-
Discount %		O Dis	count Amount*	
%	.00	\$	5.00	1

Add a New Coupon. You can add a new coupon, that than can be used in the Email Template;

ADD NEW COUPON			0
Coupon Name*			
Coupon Code*		Total Active Days*	
ODiscount %*		O Discount Amount	
%	.00	\$	

• See the POS Credentials. POS Credentials are being set up during onboarding. Terminals list is a list of POS Terminals in the Retail store. It could be added to the company by Sales Operations.

	POS CREDENTIALS FOR CRM 3		
•	Below are your POS credentials to be used upon setting up your POS software with CRM.	Add a New Cou	POS Credent
lame	URL: Username: / Password: v Terminals:	Total Days	
ing to filter	Terminals: Terminal Number Terminal Name		
Coupon	2018 Location 1	60 days	Deact
ages		60 days	Deact
irt :	ок	30 days	Deach
	Dec 12, 2018	90 days	Deacti

Once your coupons are setup in the Email Marketing product, enter your POS and create the coupon, and use the credentials presented in this window to allow for the coupons to be scanned and redeemed at the POS once it is issued to the consumer.

Settings

Manage Profile

To access this page you need to go to **Settings** section -> **Manage Profile**.

v Settings	Manage Profile					
mpany Settings O	User Information		Mailing Address			
Company Users	Username*		Address 1			
	dmytro.EUA		23 White Hague Avenue			
dd New User	Full Name*		Address 2			
	dmytro.lypovets		4th Floor, Suite 406			
	Title		Country*			
	Vice President		United States			
	E-Mail*		City			
	dmytro.lypovets@e-hps.com		New York			
	Phone Number	Ext	State'		Zip Code	
	555-495-3947	12345	Alabama	:	78165	
	Change Password Password Password New Password Confirm New Password * Industra a regulated fails	nt onle special character.	=			_
	encoder a regiment 400					Submit

Here you can edit your personal data and change the password.

Company Users

To access this page you need to go to **Settings** section -> **Company Users**.

nd Email Marketi	ing 👗 Cont	acts 💼 Reports 🔧 Tools 🗰 Settings			Contact Se
Settings O					
nage Profile	Compar	ny Users			
pany Settings Q	O Add New U	ber .			
npany Usen		Username			
1 New User					
I New Other	Active	User	E-Mail	Last Login	Actions
	8	Alan.Lewis@xenial.com	Alan.Lewis@xenial.com	01/01/1900 12:00:00 AM	
	2	brian hall@xenial.com	brian.hall@xenial.com	01/01/1900 12:00:00 AM	
	2	Cody.Cerhan@xenial.com	Cody Cerhan@xenial.com	01/01/1900 12:00:00 AM	
		Courtney.Gayetty@xenial.com	Courtney Gayetty@xenial.com	01/01/1900 12:00:00 AM	
	(R)	DL_Text_SF_Partier	draytro.lypowets_DL_Test_DF_Partner@dev-pro.net	02/20/2019 04:10:50 PM	
		dmytro.EUA	dmytro.lypovets@e-hps.com	02/20/2019 04:20:52 PM	ZEdt CReset Password Elitemove
		fadi.ezzedine@xenial.com	fadi.ezzedine@xenial.com	01/01/1900 12:00:00 AM	
	- 2	lar.Hubiar@xenial.com	tan Hublar@xenial.com	06/15/2018 03:46:19 PM	
	10	Jeffery Austin@xenial.com	Jeffery Austin@serial.com	01/01/1900 12:00:00 AM	
		Jessica Barry@xenial.com	Jessica Barry@senial.com	01/01/1900 12:00:00 AM	
	8	Jonathan Miller@xenial.com	Jonathan Miller@venial.com	01/01/1900 12:00:00 AM	
	2	Matthew bobzien@xenial.com	Matthew.bobclen@xenial.com	01/01/1900 12:00:00 AM	
	2	Michael enduser	michael.hank+5@e-hps.com	01/18/2019 07:33/42 PM	Ztdt CRest Password ERmove
	8	Partner.11149	sindoori gangapurani+7809@s-tps.com	02/13/2019 07:50:53 PM	
	. 10	Paul EndUserAdminSF	peul.destefano+13@xenial.com	02/20/2019 02:17:41 PM	East GReek Password E Remove
	- 2.	Paul PartnerTest	pjdestef+93@gmail.com	02/13/2019 10:13:50 AM	
		paul.test2	paul.destefano+26@xenial.com	01/01/1900 12:00:00 AM	ZER CRest Personal Remove
		Photos manders Brandal and	Plana manha Mandal ann	000000000 10.00.00 001	award is a sugarout balancet of Color Payments in: At Payme Reserved Your

Here you can:

- Add New User;
- Search for a user in the company;
- Edit user profile. You can't edit user profiles of any role except of EndUserAdmin.

Versent Address 1 dmythe SUA 23 Versent 4 Full Reame* Address 2 State Amount Address 3 Full Reame* Address 4 State Amount Address 4 State Amount Address 3 State Amount Address 4 State Amount Address 4 State Amount County* Vote President County* State County* State State State State State State State	User Information		Mailing Address			
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Tele Contry* Vice President United States Edital* City dmytro Jpowingie-tops com New York Phone Number Exit States* 555-5557 1235 Alabama 219 Code	Full Name*		Address 2			
Vice President United States Extail* City dmpto Jpovets@e-bps.com New York Plone Number Ext 555-655-5847 States	dmytro.lypovets		4th Fixer, Butta 406			
City City dmytro.hypowite@e-tps.com Hine: YDA Phone Number Exit Statu* Zip Code 505–6105-3647 12345 Addama 21155	Title		Country*			
dmytro.3povsta@e-bps.com New York Phone Number Ext State* Zip Code 555-195-27 12343 Alabama 73165	Vice President		United States			•
Phone Number Exit Diate* Zip Code 555-195-77 122345 Alabama 73165	E-Mail*		City			
Phone Number Ext Status* Zip Code 1050-105-1047 12345 Alabama 2 2165	dmytro.lypovets@e-hps.com		New York			
	Phone Number		State*		Zip Code	
User Security Roles*	555-495-3947	12345	Alabama	•	78165	
	User Security Roles*					
RendLinerAdmin	2 EndUserAdmin					

- Reset Password for this user. You will see a new password for this in the pop-up;
- Remove user. You will remove the user from the company.

Add New User

You can create a new EndUserAdmin in your company by accessing the Add New User page: **Settings** section -> **Add New User** tab (or **Add New User** button on the **Company Users** tab).

My Settings Oreate a New Liter Account Maring Andress Mailing Address Company Settings O Add New Uter Address 1 John Oos 23 While Negue Avenue Add New Uter Address 2 John Oos Address 06 Tile Constry Wore Preschert United States E Mair Cong Free Number E Mair Prof. State Constry City In Oos Tex Congeny Notes City Used States City John States States Voer Preschert States Voer States States Voer States States	Murap Profit Maing Address Company Seting 0 Maing Address Arrand* Adress 1 Company Seting 0 23 White Name Arrand* Adress 2 Et Nam* Adress 4 Et Nam* County* Et Nam* Same* Et Nam* Et Nam* Et Nam* Et Nam* <	Maraja Purlia longaray Satting Company Satting Advent User Advent Advent A	land Email Marketin					dmptro.EUA Contact	
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	2 EndJaerAnn	2 Endberkdmin		555-495-3947	12345	Alabama	:	78165	
* indicates a required field				2 EndUserAdmin					

Filling all required fields:

- UserName would be used for LogIn;
- ► Full Name;
- ► Email;
- Country. United States by default;
- State. Alabama by default.

You can't select any other user role except of EndUserAdmin.

When you click on the Submit button - the user you are adding will receive an email with the link to set a password.