

Heartland | Email Marketing

Merchant (EndUserAdmin) Quick Start Guide

Rev. 3/2019

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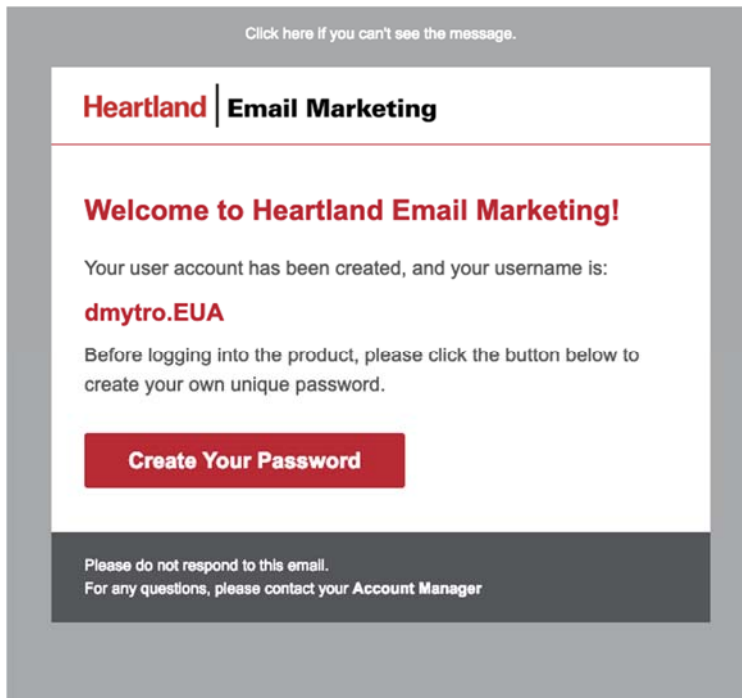
Date	Document Version	EM Version	Summary
02/21/2019	V 1.1	V 10.0.2	SMB rebranding to Heartland Email Marketing

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.

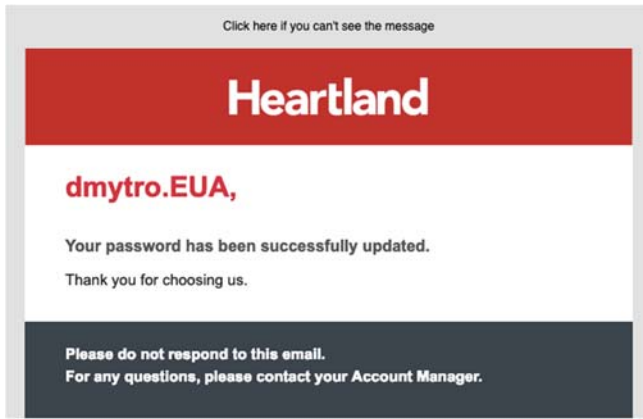


SMB - Reset Password page

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

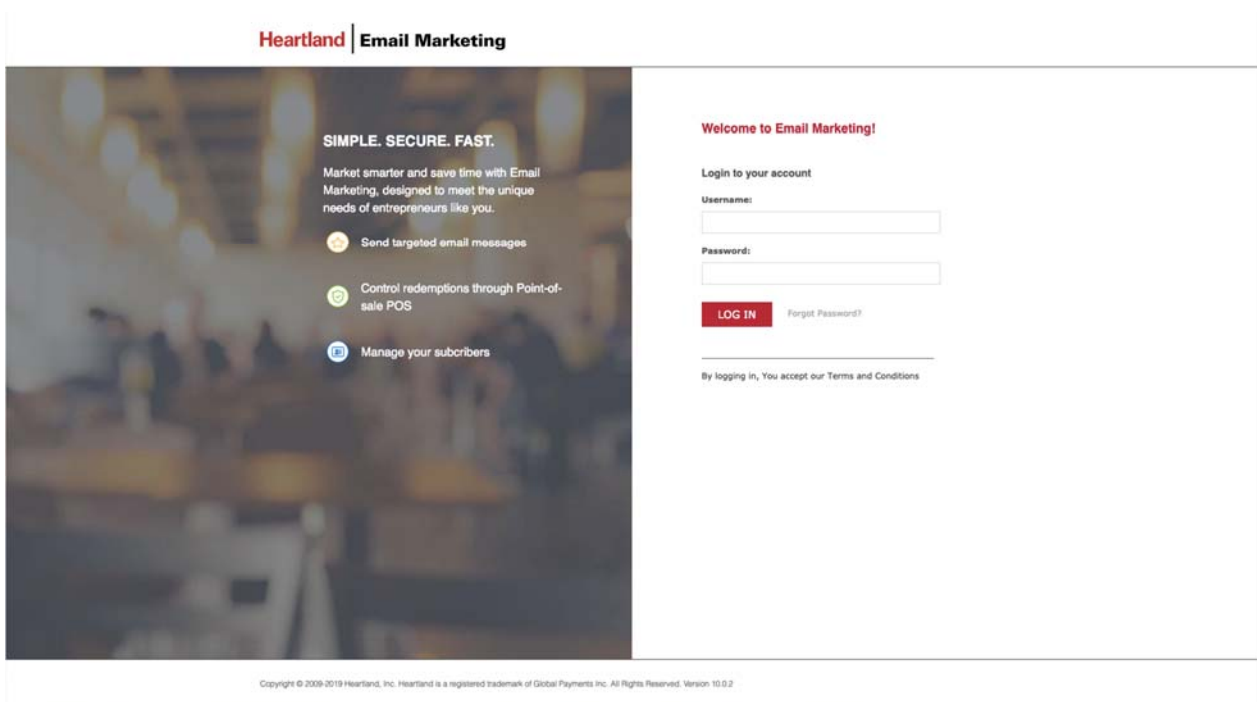
After Resetting the Password the merchant will receive an automated email with confirmation that the password was successfully reset.



SMB - LogIn Page

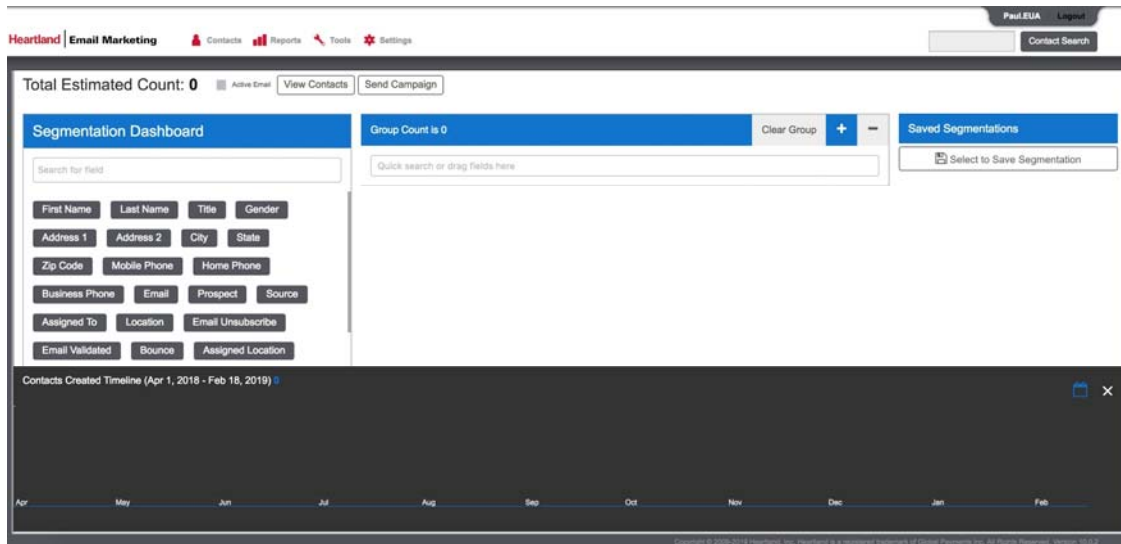
After Resetting the Password the merchant is taken to the LogIn page. Here you can

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



SMB - Contacts (Default Page for EndUserAdmin)

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



Adding Contacts to Email Marketing

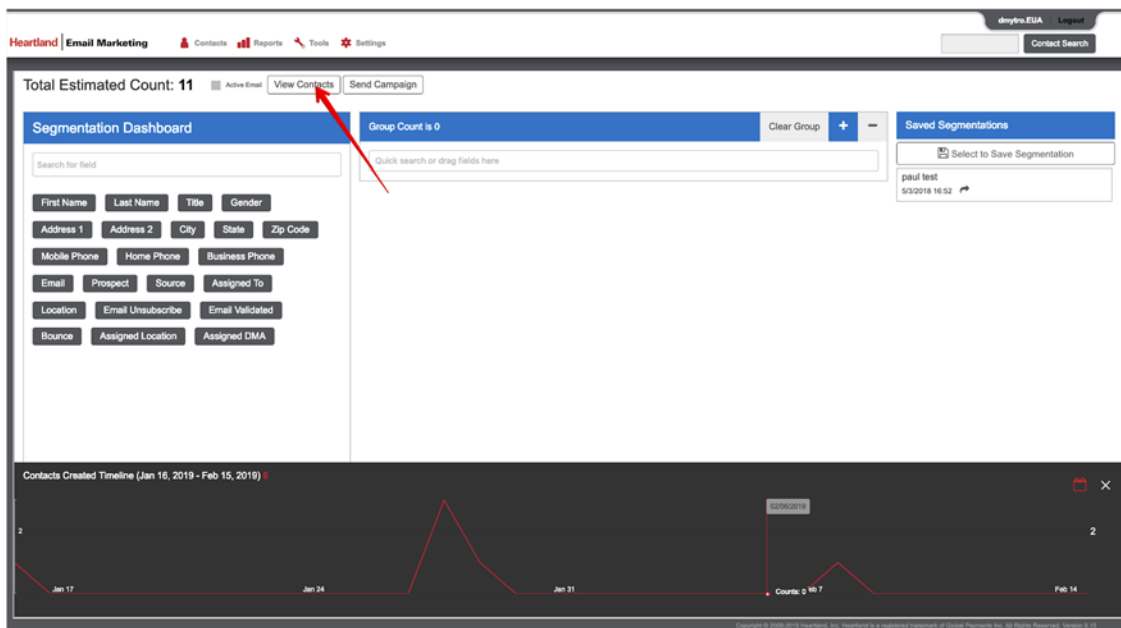
To send campaigns there should be customers. Customers can appear in the system by:

- ▶ Manual Adding;
- ▶ Import;
- ▶ Online Form.

1. Manual adding contacts.

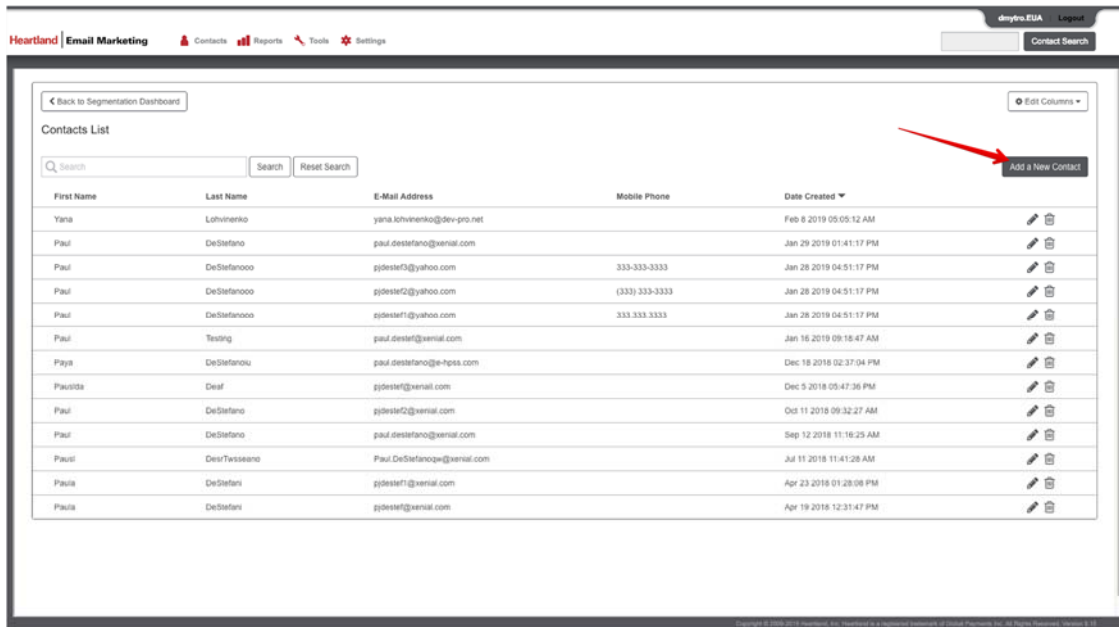
a. View Contacts

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



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.



The screenshot displays the 'Contacts List' interface. At the top, there is a navigation bar with 'Heartland | Email Marketing' and several menu items: 'Contacts', 'Reports', 'Tools', and 'Settings'. A search bar is located at the top left of the main content area, and a 'Contact Search' button is at the top right. The main content area features a table with the following columns: 'First Name', 'Last Name', 'E-Mail Address', 'Mobile Phone', and 'Date Created'. The table contains 15 rows of contact data. A red arrow points to a button labeled 'Add a New Contact' located in the top right corner of the table area.

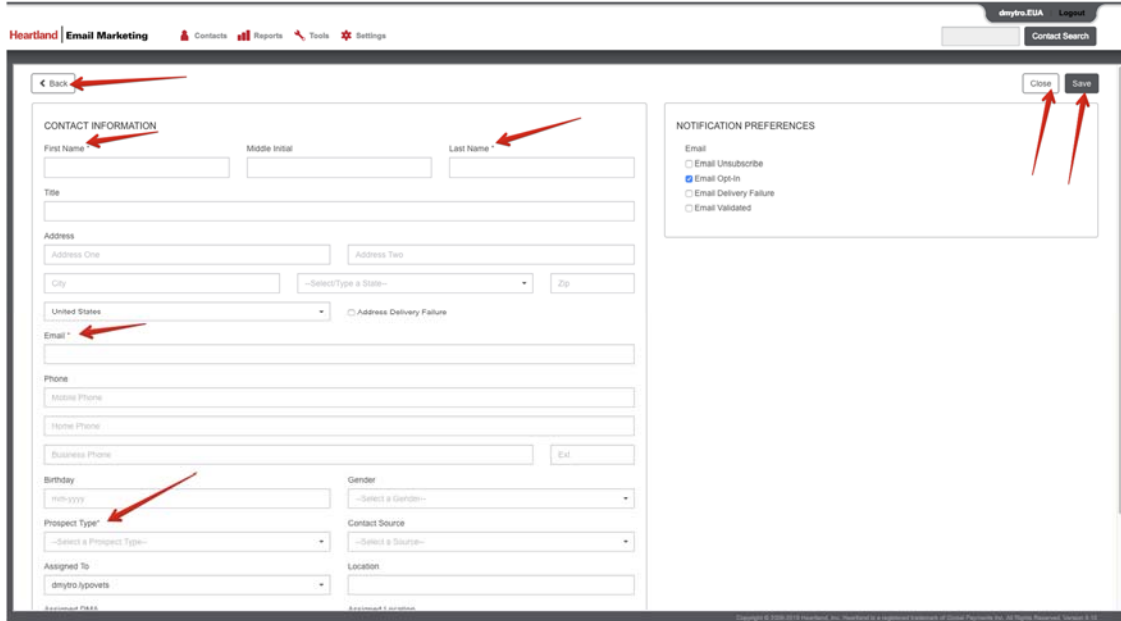
First Name	Last Name	E-Mail Address	Mobile Phone	Date Created
Yana	Lohvnenko	yana.lohvnenko@dev-pro.net		Feb 8 2019 05:05:12 AM
Paul	DeStefano	paul.destefano@xerial.com		Jan 29 2019 01:41:17 PM
Paul	DeStefano	gdestef@yahoo.com	333-333-3333	Jan 28 2019 04:51:17 PM
Paul	DeStefano	gdestef@yahoo.com	(333) 333-3333	Jan 28 2019 04:51:17 PM
Paul	DeStefano	gdestef@yahoo.com	333.333.3333	Jan 28 2019 04:51:17 PM
Paul	Testing	paul.destef@xerial.com		Jan 16 2019 09:18:47 AM
Pays	DeStefano	paul.destefano@e-hps.com		Dec 18 2018 02:37:04 PM
Paulita	Deaf	gdestef@xerial.com		Dec 5 2018 05:47:36 PM
Paul	DeStefano	gdestef@yahoo.com		Oct 11 2018 09:32:27 AM
Paul	DeStefano	paul.destefano@xerial.com		Sep 12 2018 11:16:25 AM
Paul	DeStefano	Paul.DeStefano@xerial.com		Jul 11 2018 11:41:28 AM
Paula	DeStefano	gdestef@yahoo.com		Apr 23 2018 01:28:08 PM
Paula	DeStefano	gdestef@yahoo.com		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. Then the contact can be saved.



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.



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).

Data Import | Step 2 Preview/Edit Mode

This is a preview of what your document will look like. Please continue to the next step to complete your import.

First_name x	Last_Name x	email_address x
Select an Option Please remove this field in order to proceed with the import.	Select an Option Please remove this field in order to proceed with the import.	Select an Option Please remove this field in order to proceed with the import.
Test	Testio	test.testio2test.com
Dmytro	Lypovets	dmytro.lypovets@dev-pro.net
Test	Testio	test.testio2test.com
Dmytro	Lypovets	dmytro.lypovets@dev-pro.net
Test	Testio	test.testio2test.com
Dmytro	Lypovets	dmytro.lypovets@dev-pro.net

Buttons: Import, Cancel

Links: New Custom Field, Advanced Options

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! ✕

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 Cancel

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.

Data Import | History **Start New Import**

Active Imports							
Job Id	Filename	Date	Total Records	User	Status	Info	
4573	Test_Book.csv	Feb 15, 2019 7:04 AM	6 / 6	DL_Test_BSI_Admin	✓ Complete	Info	
644	TestCSV.csv	Mar 23, 2018 2:54 PM	0 / 3	bao.ho	Importing	Info	
643	TestCSV.csv	Mar 23, 2018 2:52 PM	0 / 3	bao.ho	Importing	Info	
642	TestCSV.csv	Mar 23, 2018 2:45 PM	0 / 3	bao.ho	Importing	Info	
641	TestCSV.csv	Mar 23, 2018 2:22 PM	0 / 3	bao.ho	Importing	Info	

Completed Imports							
Job Id	Filename	Date	Records Imported	User	Status	Info	
4523	7626-ENT.csv	Nov 21, 2018 9:48 AM	2	Sindoori.EndUser	✓ Complete	Info	
1023	TestCSV.csv_original.csv	Jun 21, 2018 5:17 PM	1	bao.ho	✓ Complete	Info	
1022	TestCSV.csv_original.csv	Jun 21, 2018 5:07 PM	1	bao.ho	✓ Complete	Info	
1021	TestCSV.csv_original.csv	Jun 21, 2018 5:06 PM	1	bao.ho	✓ Complete	Info	
955	7626-SMB.csv	May 15, 2018 4:18 PM	4	Sindoori.Admin	✓ Complete	Info	

Show more

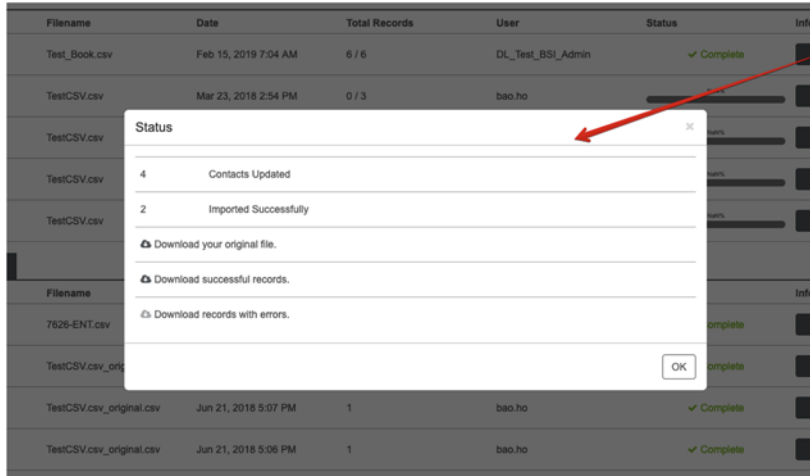
Please contact EMescalations@heartland.us if you need any assistance with the Import tool.

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:
 - Contacts Updated - shows the counter;
 - 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	DI_Test_BSI_Admin	✓ Complete	
TestCSV.csv	Mar 23, 2018 2:54 PM	0 / 3	bao.ho		
TestCSV.csv					
TestCSV.csv					
TestCSV.csv					
TestCSV.csv					
7626-ENT.csv				Complete	
TestCSV.csv_orig				Complete	
TestCSV.csv_original.csv	Jun 21, 2018 5:07 PM	1	bao.ho	✓ Complete	
TestCSV.csv_original.csv	Jun 21, 2018 5:06 PM	1	bao.ho	✓ Complete	

Status

- 4 Contacts Updated
- 2 Imported Successfully
- Download your original file.
- Download successful records.
- Download records with errors.

OK

3. Online Forms

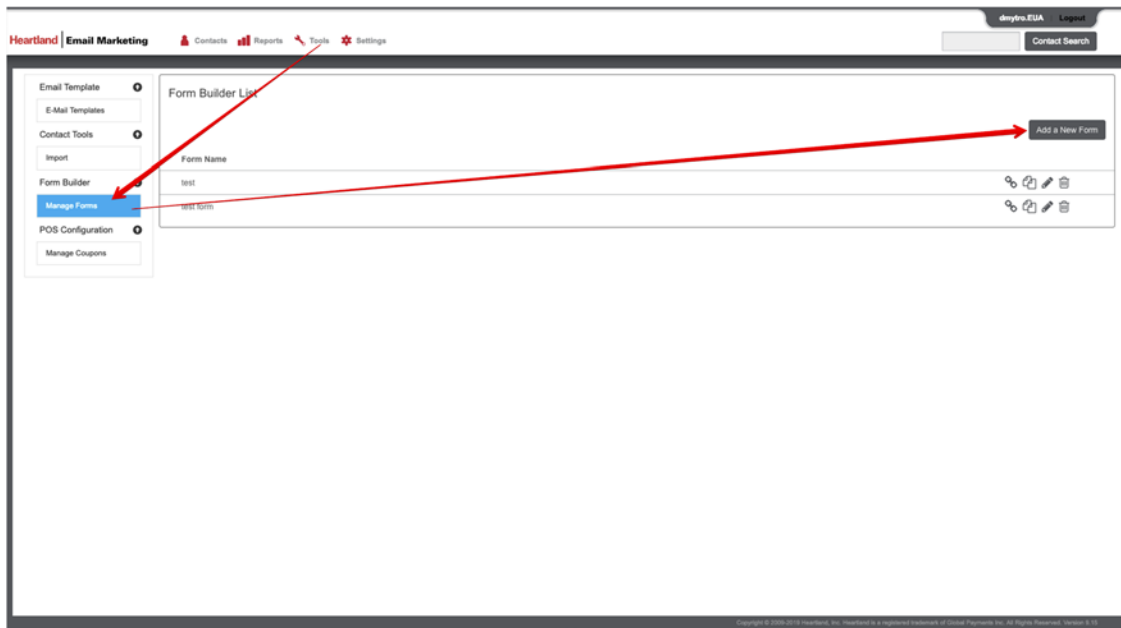
One of the ways to get user to the system - is through Online Forms. They can be adjusted to the 3rd party systems, or share like a direct link to the form.

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.



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:
 - 2 Columns (selected by default);
 - 1 Column;
- ▶ Choose a theme:
 - Light Theme (selected by default);
 - Dark Theme;

All other modifications are optional.

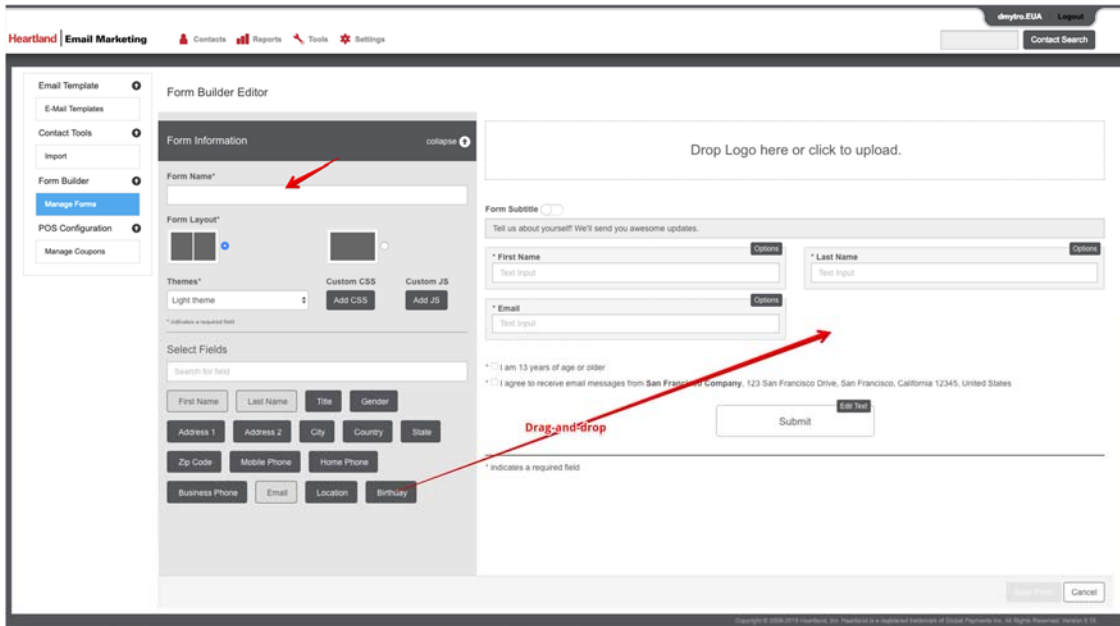
The default form provides you with 3 default fields that is enough to onboard a contact:

- ▶ First Name;
- ▶ Last Name;
- ▶ Email;

And also 2 checkboxes (they are not modified).

Form customization:

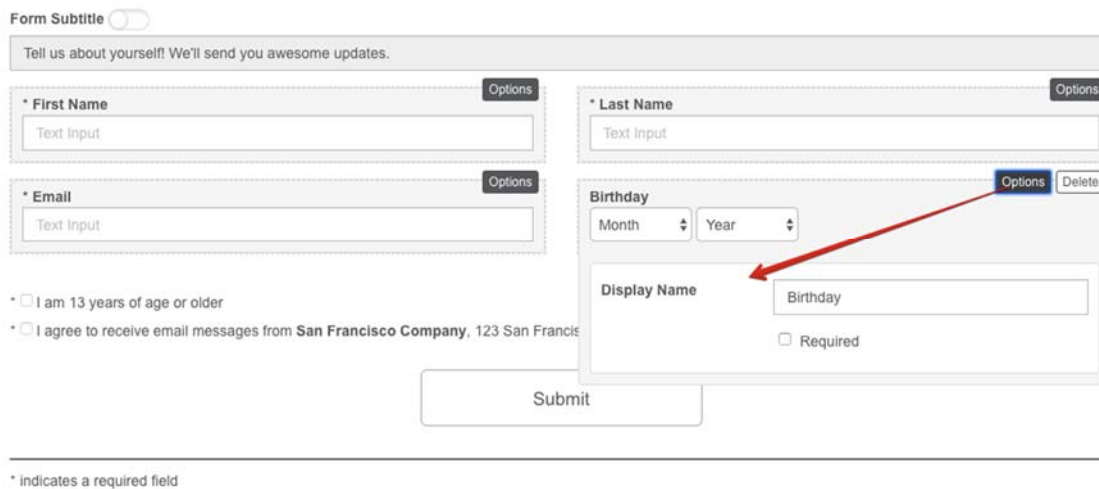
- ▶ Adding a Logo:
 - Click on the field to open a dialog window;
 - Drag-and-drop to the browser;
- ▶ Enable/Disable custom subtitle;
- ▶ Add more fields to the form via drag-and-drop from the search fields list;
- ▶ Edit the name of the Submit button.



- ▶ Configure the field

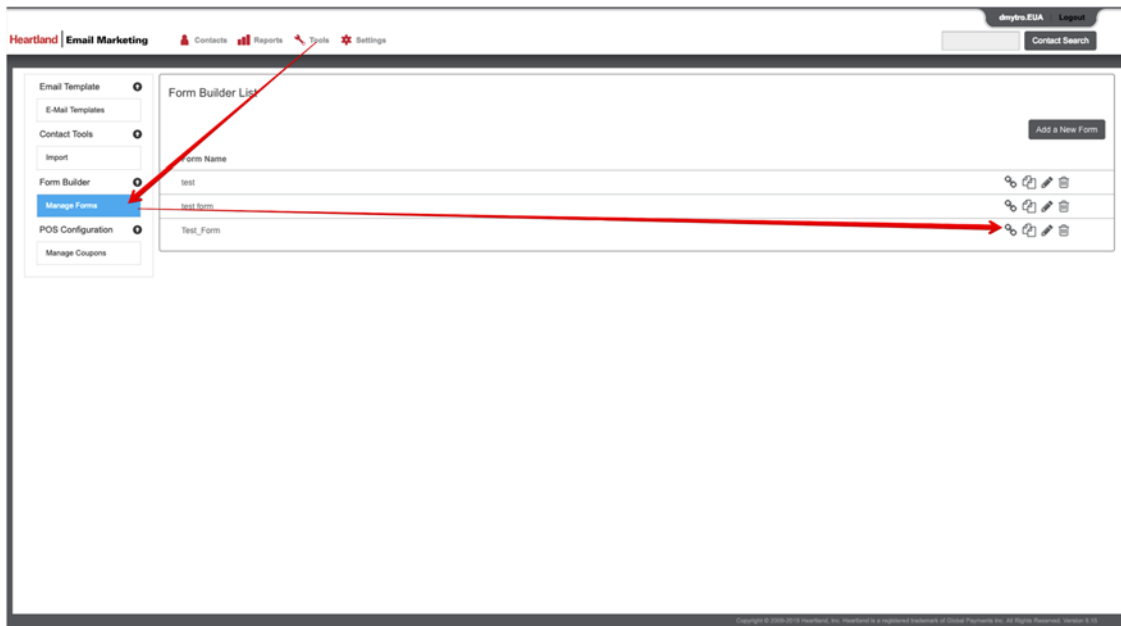
For all added fields to the form it is possible to change the title.

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



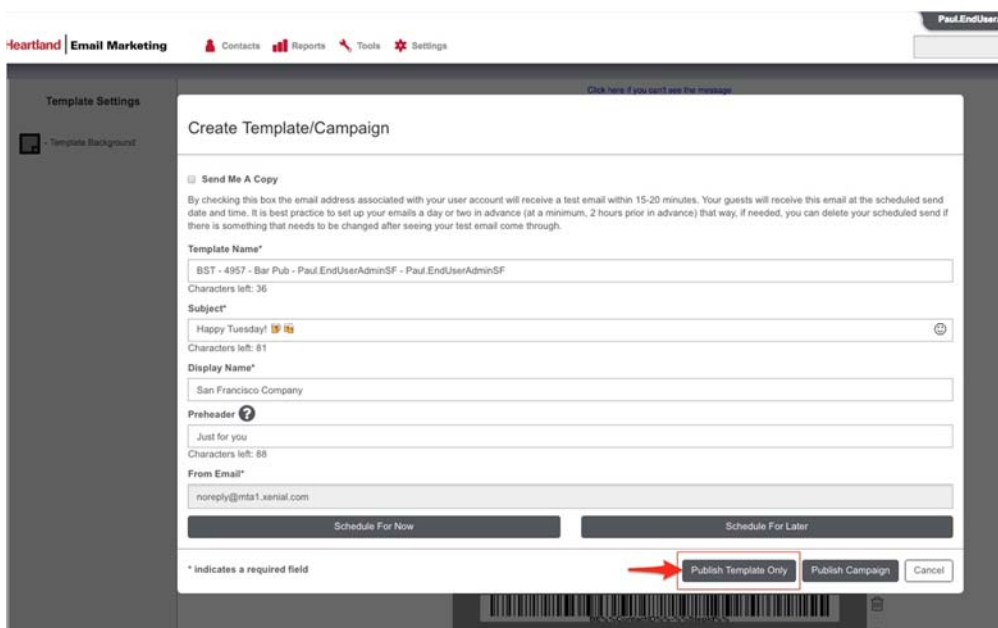
c. Getting online forms

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.



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:



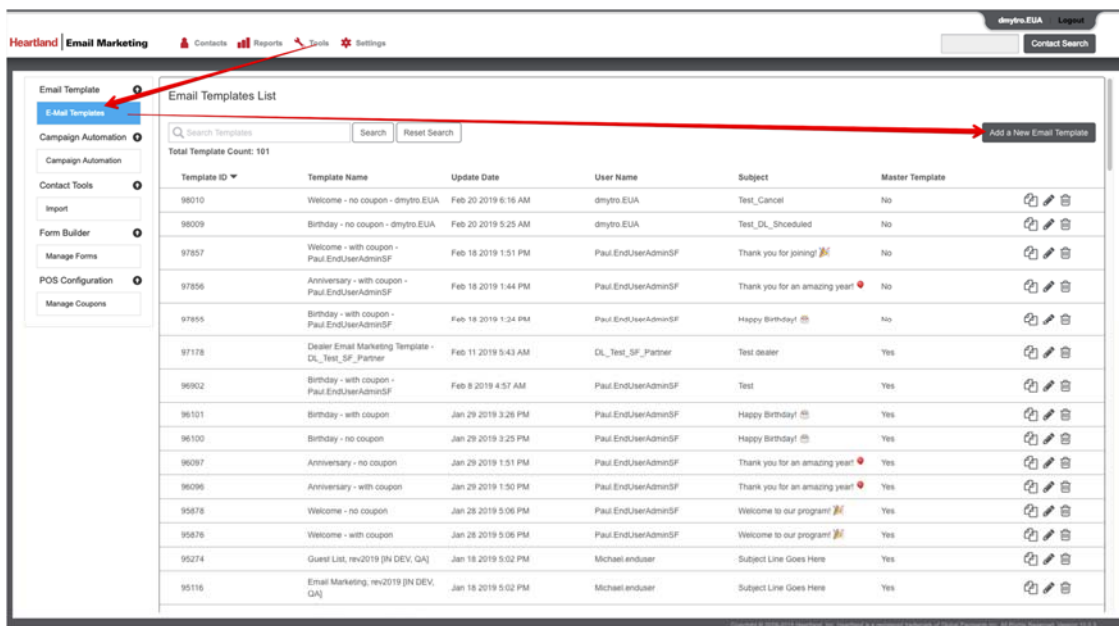
You can also select the **Publish Campaign** button to actually send the campaign out to you desired contacts, and you will be prompted and asked if you would like to make the template a Master Template.



Email Templates

Access Tools section -> E-Mail Templates tab.

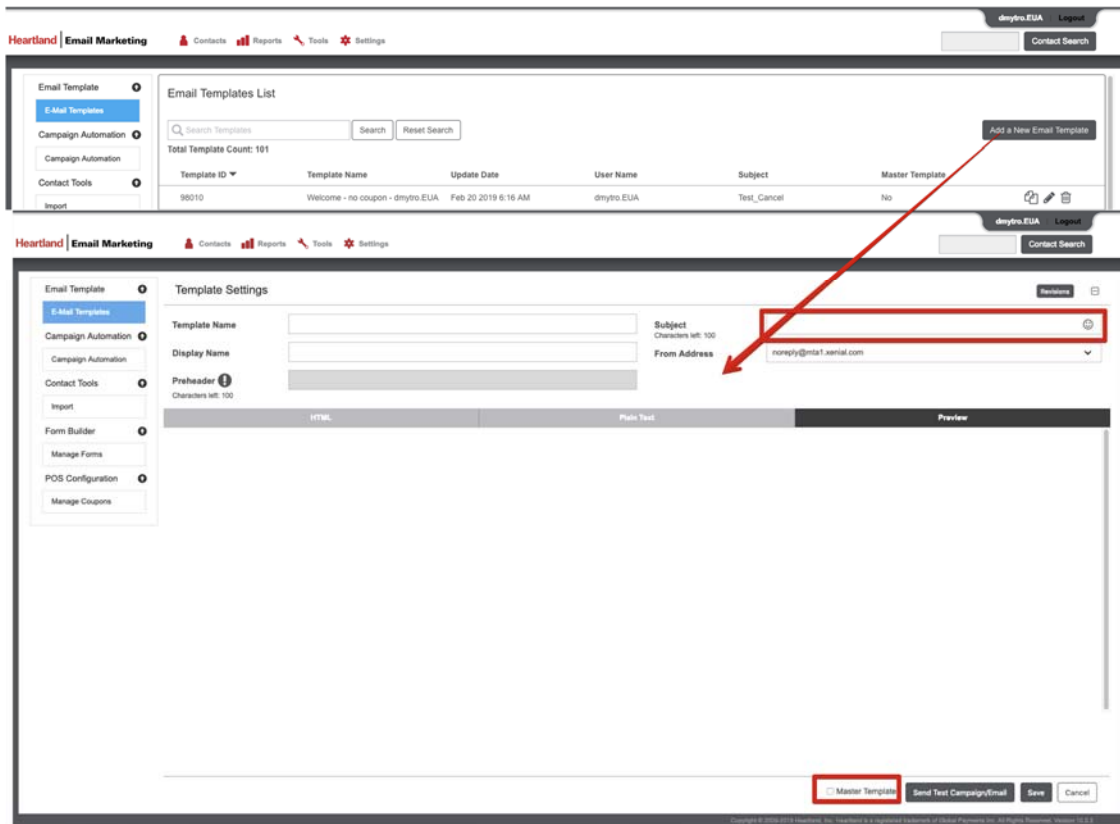
1 Email Templates List.



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.



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)

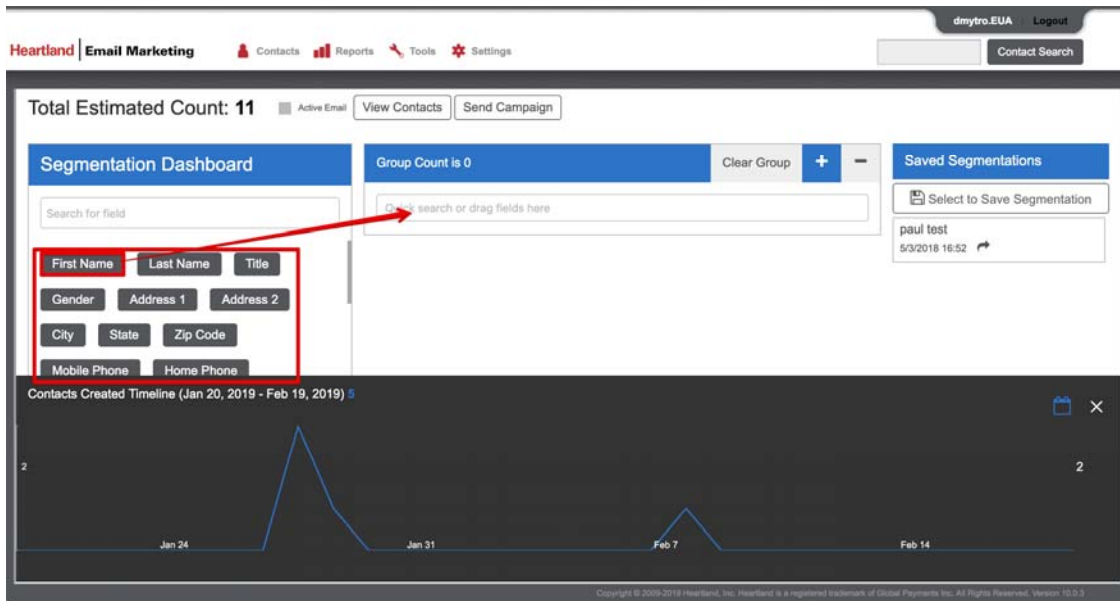
You can create a template by entering a custom HTML code.

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

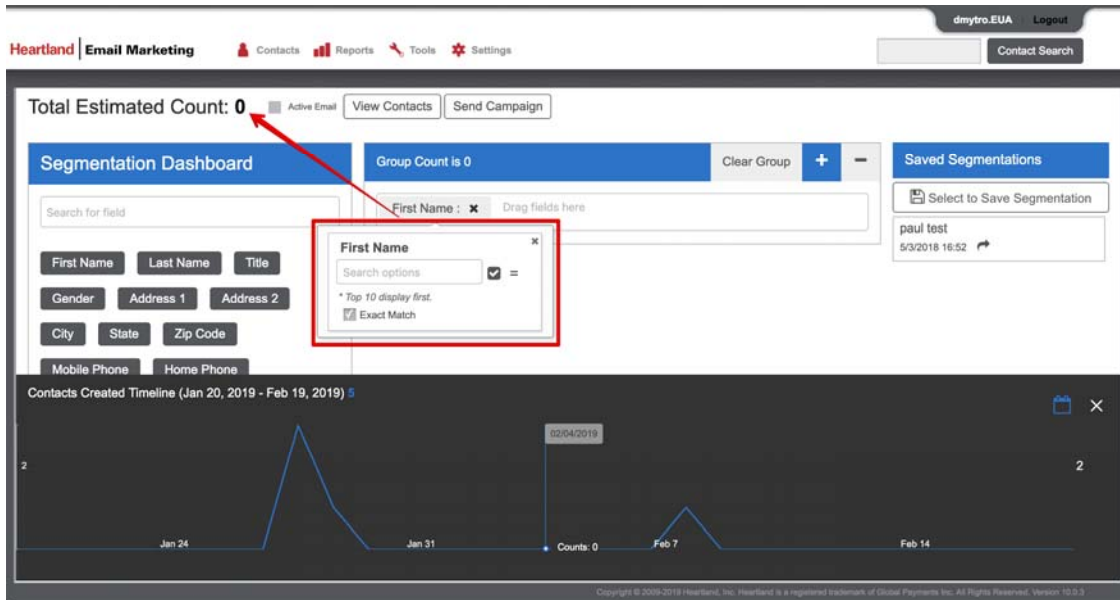
To define your audience, that should receive the particular campaign or just to filter contacts you need to make a filtration for them. It could be done through Segmentation Dashboard.



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.



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

Heartland | Email Marketing Contacts Reports Tools Settings dmtyro.EUA Logout Contact Search

Search

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	
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	
Paul	DeStefanooo	No segmentation query	3333	Jan 28 2019 04:51:17 PM	
Paul	DeStefanooo	pjdestef1@yahoo.com	333.333.3333	Jan 28 2019 04:51:17 PM	
Paul	Testing	paul.destef@xenial.com		Jan 16 2019 09:18:47 AM	
Paya	DeStefanolu	paul.destefano@e-tpss.com		Dec 18 2018 02:37:04 PM	
Pauslda	Deaf	pjdestef@xenial.com		Dec 5 2018 05:47:36 PM	
Paul	DeStefano	pjdestef2@xenial.com		Oct 11 2018 09:32:27 AM	
Paul	DeStefano	paul.destefano@xenial.com		Sep 12 2018 11:16:25 AM	
Paul	DesrTwsseano	Paul.DeStefanoq@xenial.com		Jul 11 2018 11:41:28 AM	
Paula	DeStefani	pjdestef1@xenial.com		Apr 23 2018 01:28:08 PM	
Paula	DeStefani	pjdestef@xenial.com		Apr 19 2018 12:31:47 PM	

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Heartland | Email Marketing Contacts Reports Tools Settings dmtyro.EUA Logout Contact Search

Contacts List

Search

First Name	Last Name	E-Mail Address	Mobile Phone	Date Created	
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	
Paul	DeStefanooo	With segmentation query	333-333-3333	Jan 28 2019 04:51:17 PM	
Paul	DeStefanooo	pjdestef1@yahoo.com	333.333.3333	Jan 28 2019 04:51:17 PM	
Paul	Testing	paul.destef@xenial.com		Jan 16 2019 09:18:47 AM	
Paul	DeStefano	pjdestef2@xenial.com		Oct 11 2018 09:32:27 AM	
Paul	DeStefano	paul.destefano@xenial.com		Sep 12 2018 11:16:25 AM	

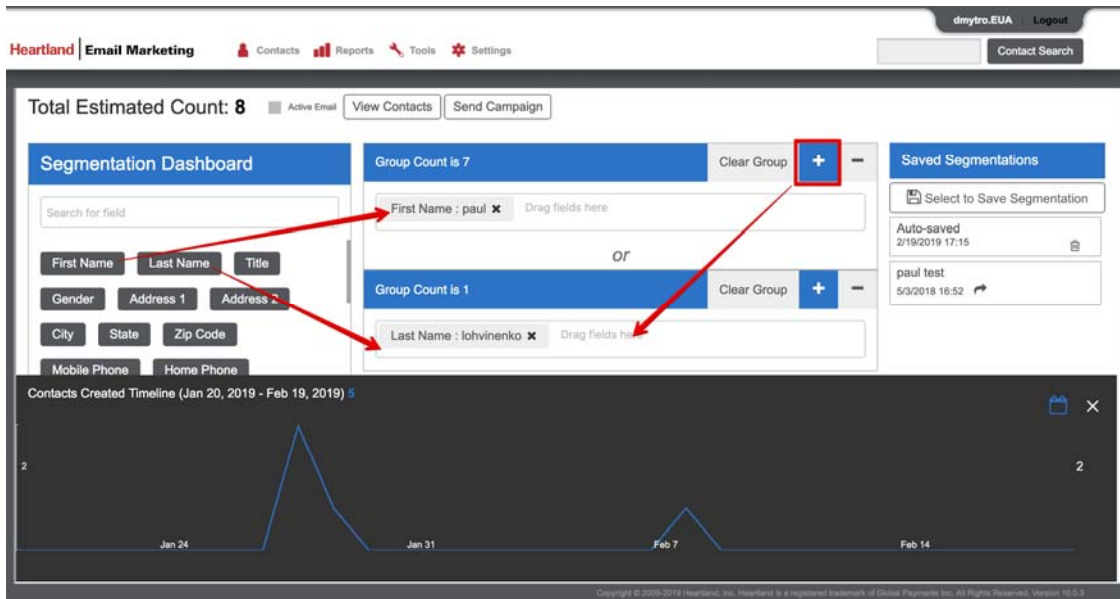
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Multiple Segmentations

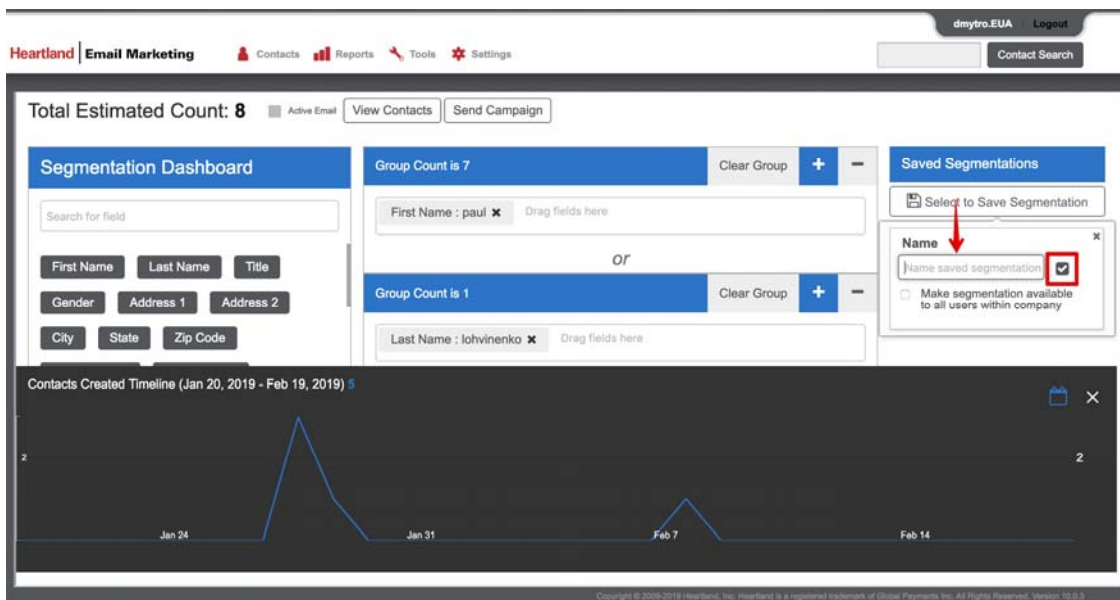
To proceed with more optional filtration you can create advanced segmentation preferences. It will show results that match either one or another query.

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

You can have numerous amount of such segmentation options.



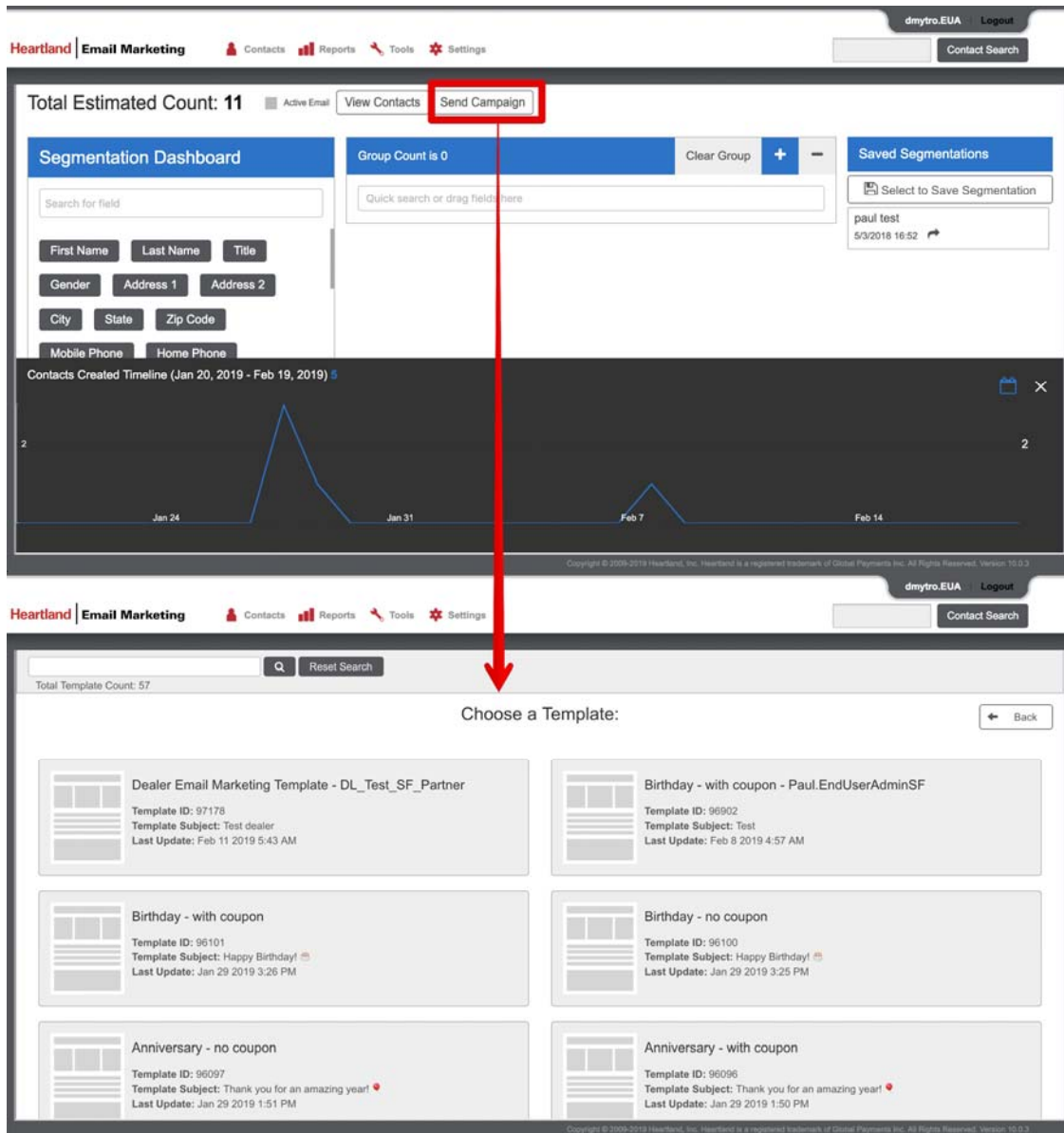
You can save different segmentations for later users by clicking **Select to Save Segmentation**.



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.



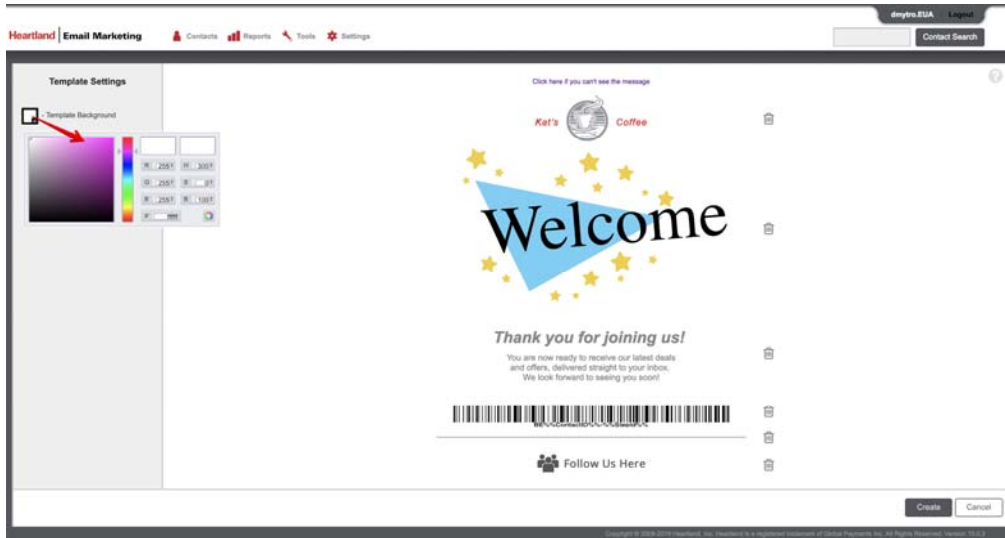
It will prompt you to the Choose a Template page. Templates are the master Templates created on the **E-Mail Templates** tab as a Master template, but you can make edits to customize it for each particular campaign.

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

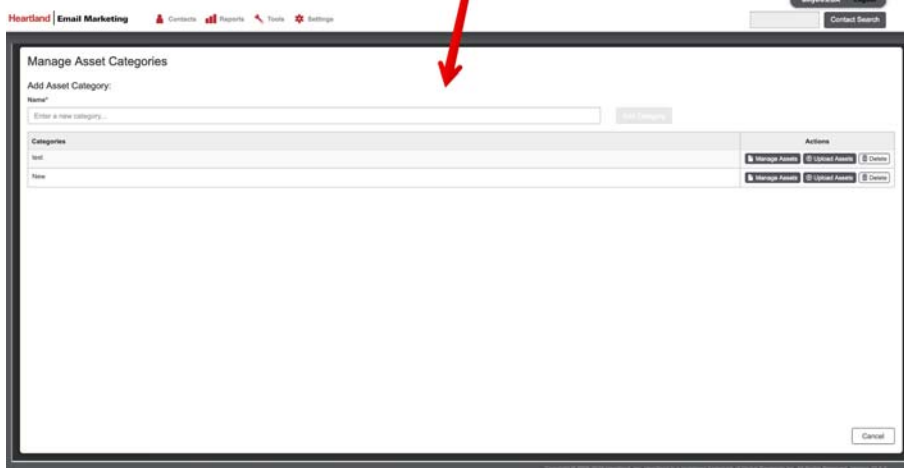
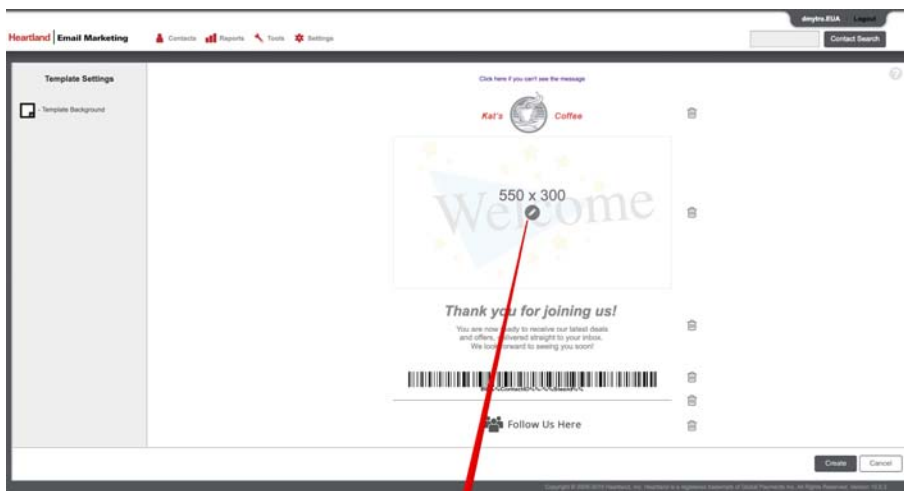
Step 2. Edit a Template

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

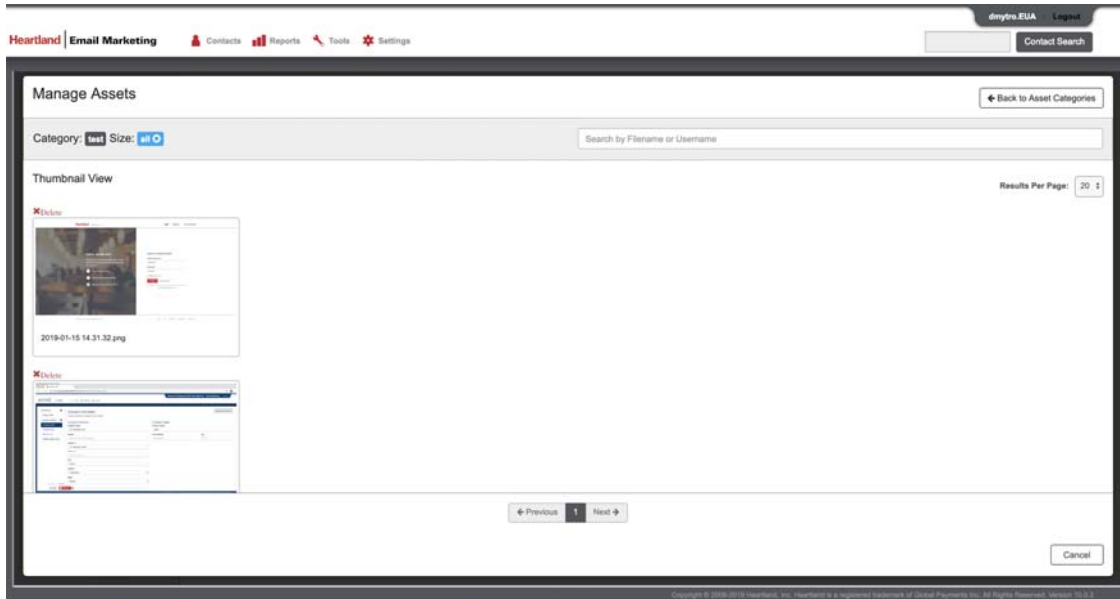
- 1 Change the Background color. You can change the template background color.



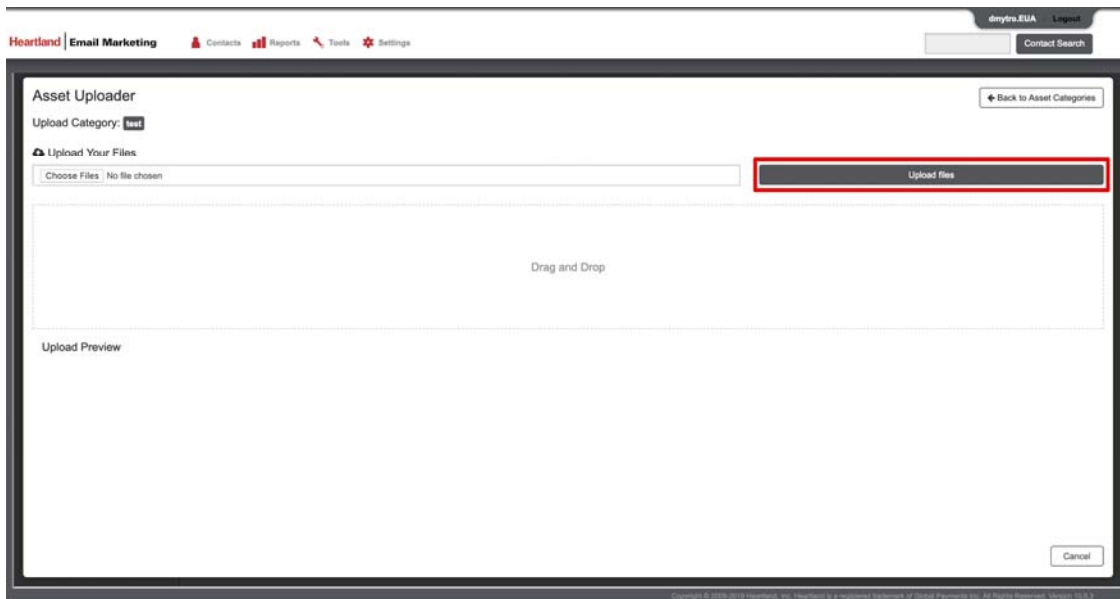
2 **Edit images** in the template. You need to press on the **pencil** button on the existing image and it will open a pop-up to upload new image, or use previously uploaded one.



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



- ▶ **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**.



- 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.

Edit Paragraph

Text

Heading 1 | Font Family | Font Size | **B** | *I* | U | A | ☰

Thank you for joining us!

Save
Cancel

- 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 pop-up 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.

The image shows two screenshots of the Heartland Email Marketing interface. The top screenshot displays a 'Welcome' email template with a blue banner, yellow stars, and the text 'Welcome', 'Thank you for joining us!', and a barcode. A red box highlights the 'Create' button in the bottom right corner. The bottom screenshot shows the 'Create Template/Campaign' form with fields for Template Name, Subject, Display Name, Preheader, and From Email. A red arrow points from the 'Create' button in the top screenshot to the 'Create Template/Campaign' form in the bottom screenshot.

Heartland | Email Marketing | Contacts | Reports | Tools | Settings | dmtyro.EUA | Logout | Contact Search

Template Settings

Click here if you can't see the message

Kaf's Coffee

Welcome

Thank you for joining us!

You are now ready to receive our latest deals and offers, delivered straight to your inbox. We look forward to seeing you soon!

Follow Us Here

Create Cancel

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Heartland | Email Marketing | Contacts | Reports | Tools | Settings | dmtyro.EUA | Logout | Contact Search

Template Settings

Create Template/Campaign

Send Me A Copy

By checking this box 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 send date 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 send if there is something that needs to be changed after seeing your test email come through.

Template Name*

Welcome - with coupon - dmtyro.EUA

Characters left: 66

Subject*

Characters left: 100

Display Name*

San Francisco Company

Preheader ?

Just for you

Characters left: 88

From Email*

noreply@enta1.xenial.com

Schedule For Now Schedule For Later

* indicates a required field

Publish Template Only Publish Campaign Cancel

Create Cancel

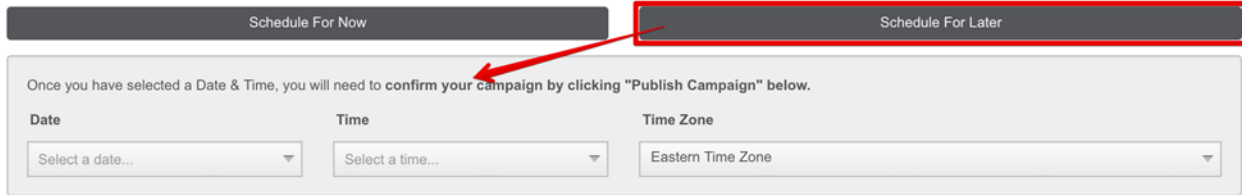
Copyright © 2008-2013 Heartland, Inc. Heartland is a registered trademark of Global Payments Inc. All Rights Reserved. Version 10.0.3

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.

Then 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:



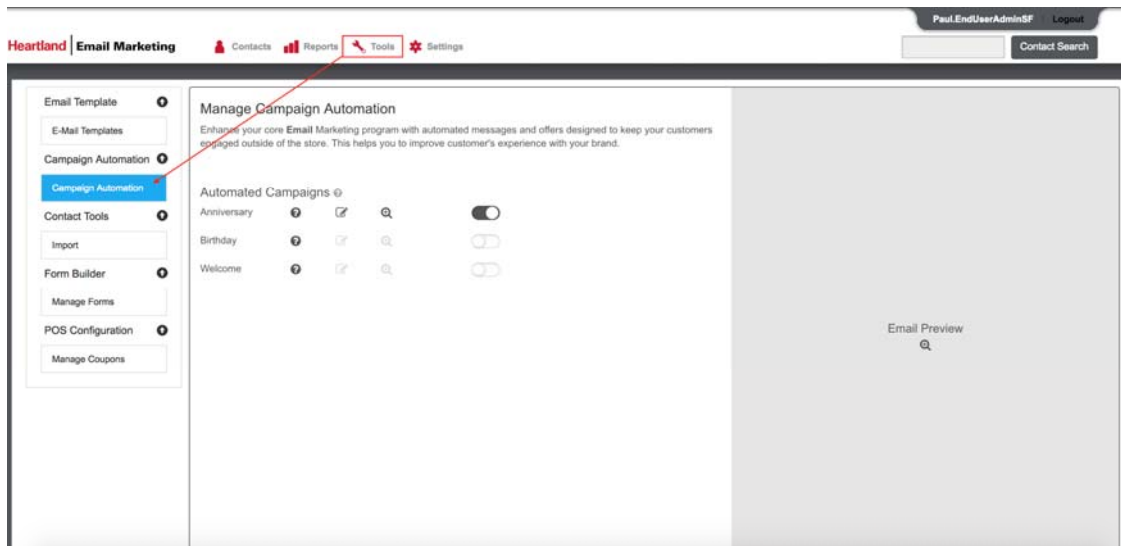
The screenshot shows a scheduling interface with two tabs: "Schedule For Now" and "Schedule For Later". The "Schedule For Later" tab is highlighted with a red box. Below the tabs, a red arrow points to a text instruction: "Once you have selected a Date & Time, you will need to confirm your campaign by clicking 'Publish Campaign' below." Below this instruction are three dropdown menus: "Date" (with "Select a date..." text), "Time" (with "Select a time..." text), and "Time Zone" (with "Eastern Time Zone" text).

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

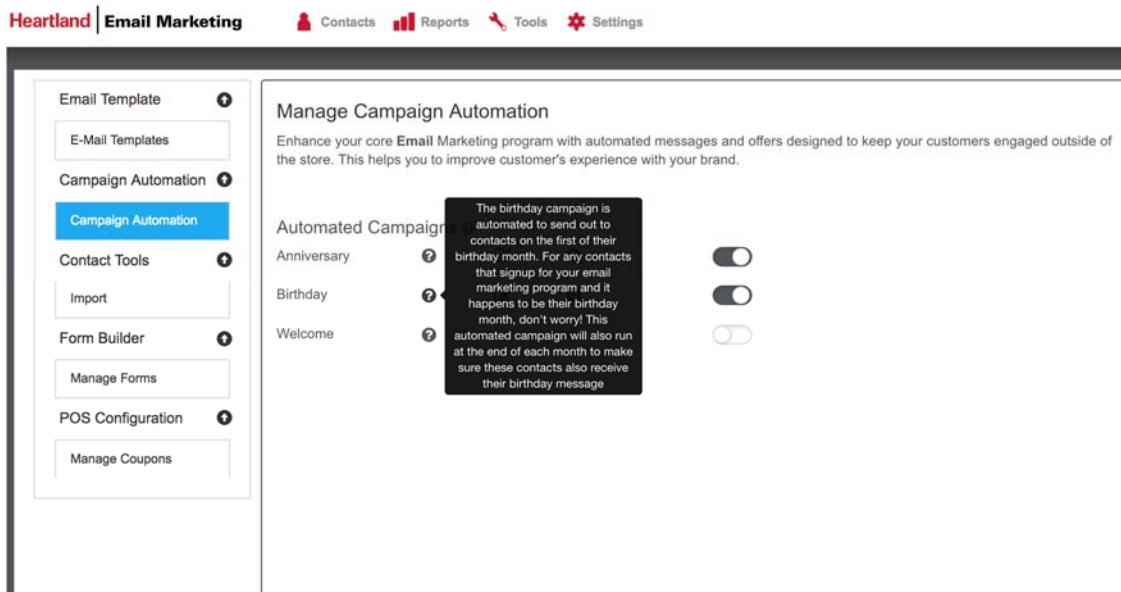
To access the Campaign Automation page you need to go to **Tools** section -> **Campaign Automation** tab.



The screenshot shows the "Manage Campaign Automation" page in the Heartland Email Marketing interface. The top navigation bar includes "Heartland | Email Marketing", "Contacts", "Reports", "Tools" (highlighted with a red box), and "Settings". The "Tools" section is expanded, showing "Campaign Automation" as the selected tab. The main content area is titled "Manage Campaign Automation" and includes a description: "Engages your core Email Marketing 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." Below this, there is a section for "Automated Campaigns" with a list of campaigns: "Anniversary", "Birthday", and "Welcome". Each campaign has a toggle switch and a search icon. The "Anniversary" toggle is turned on, while "Birthday" and "Welcome" are turned off. On the right side of the page, there is an "Email Preview" section.

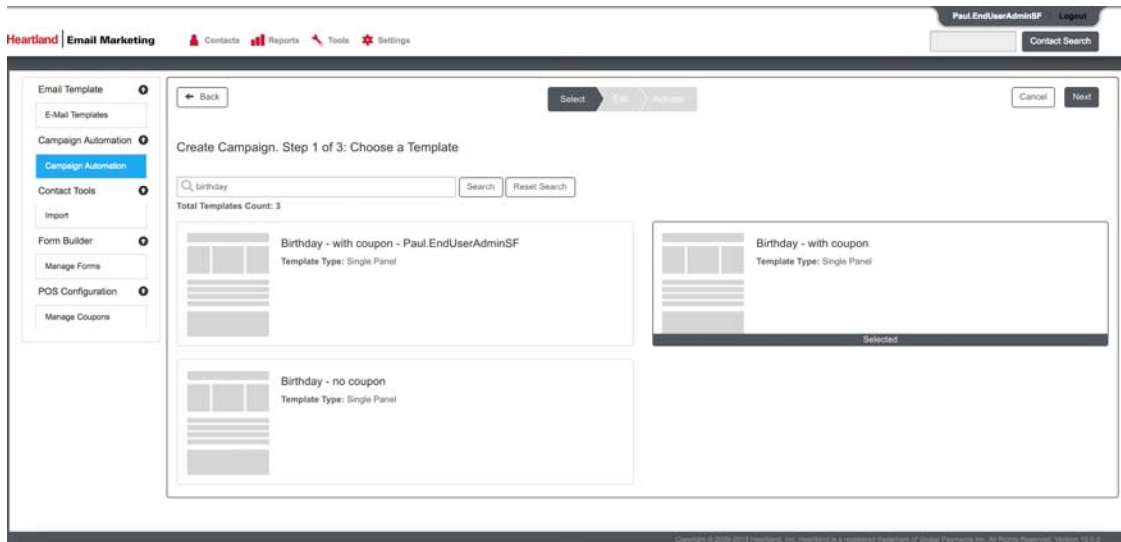
To start, hover over all tool tips to get familiar with the different automated campaigns available.

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



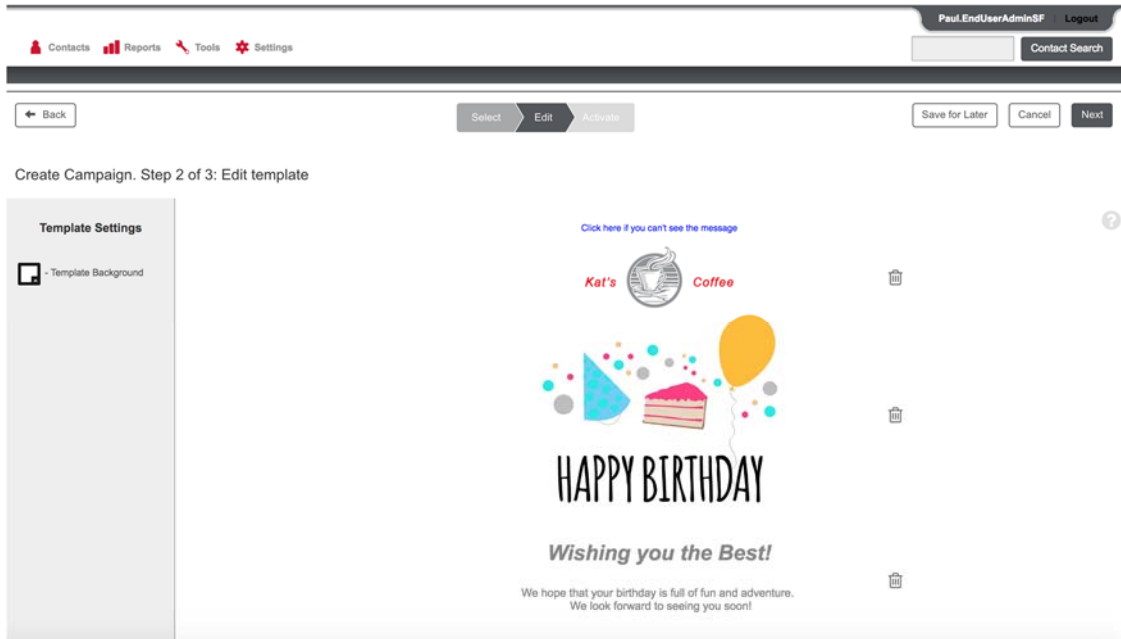
Step 1: Select a Template

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



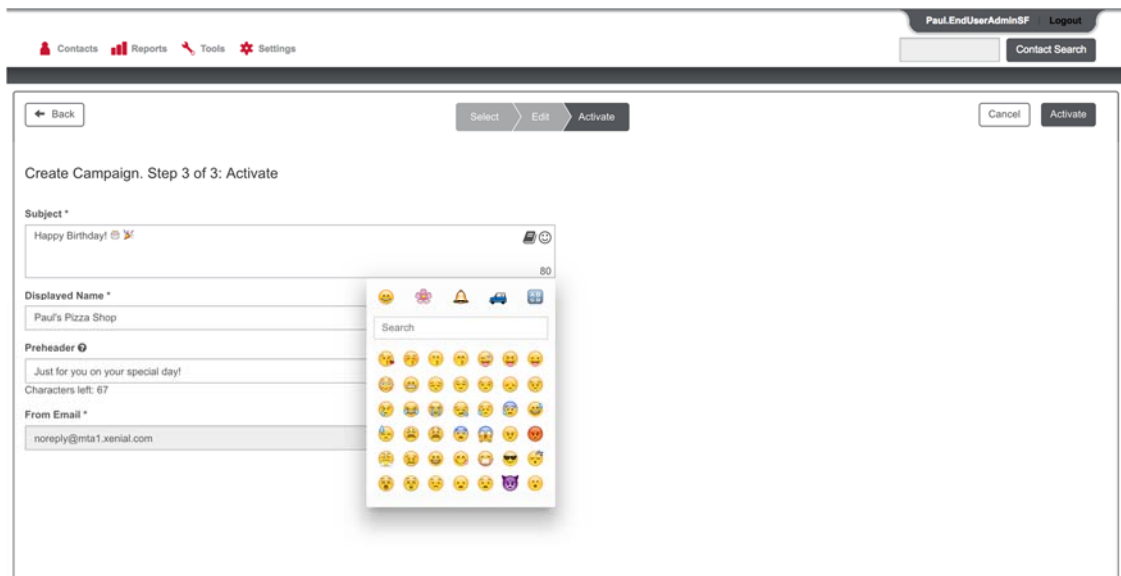
Step 2. Edit a Template

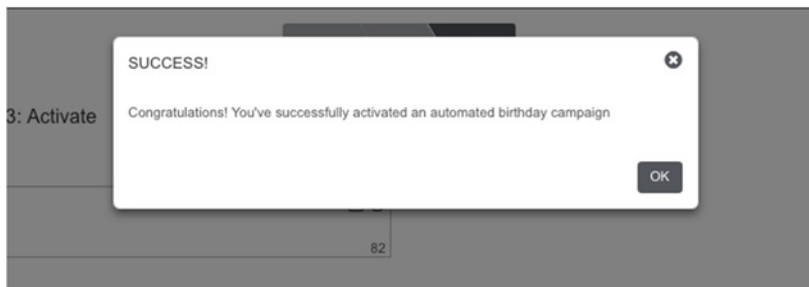
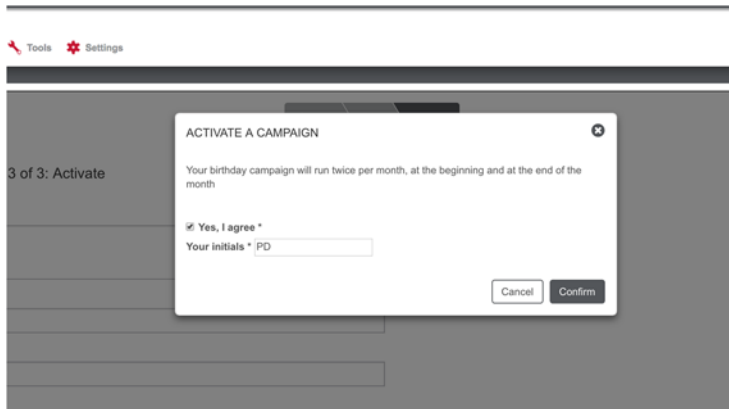
- ▶ Edit the template by adding text, images, or social media links to customize it to your liking:



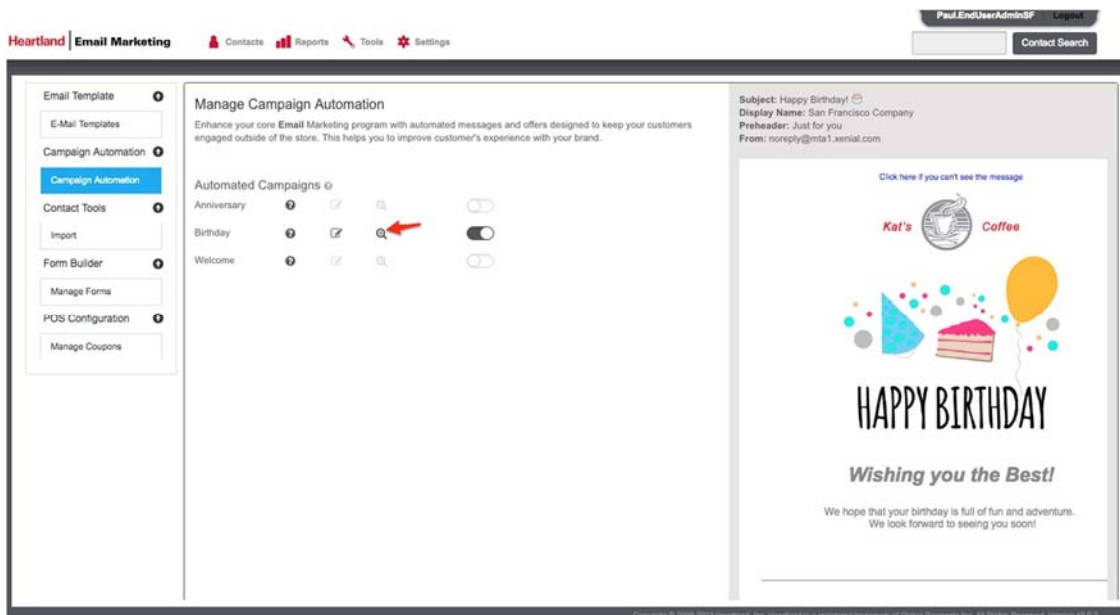
Step 3: Activate an Automated Campaign

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

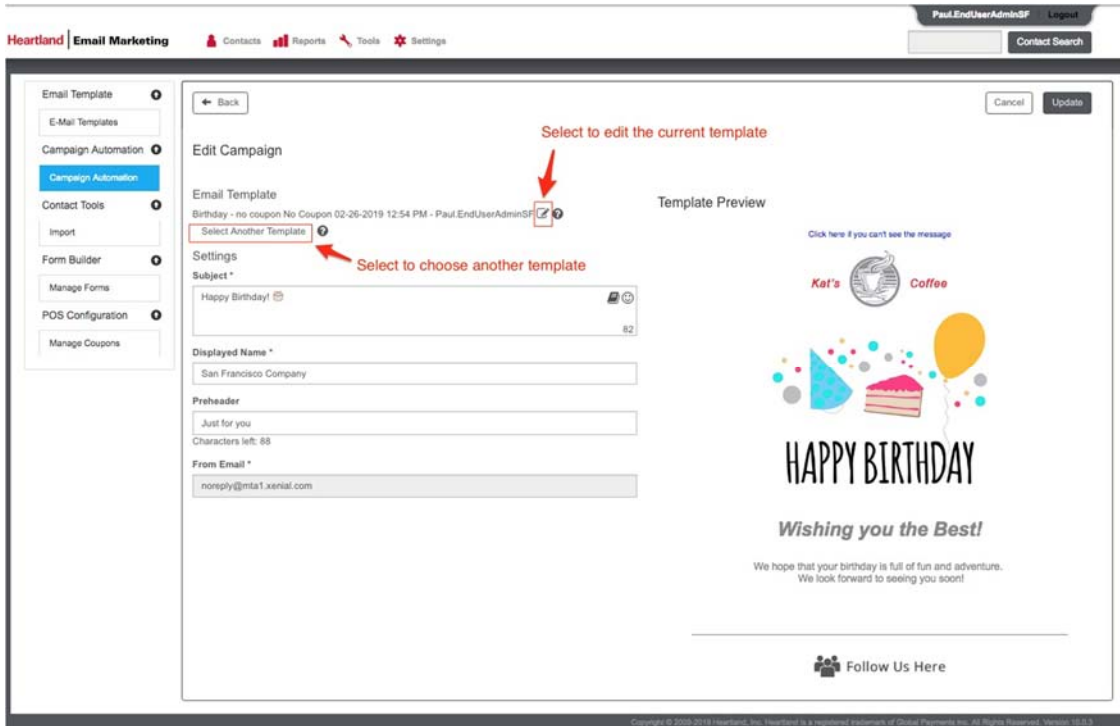
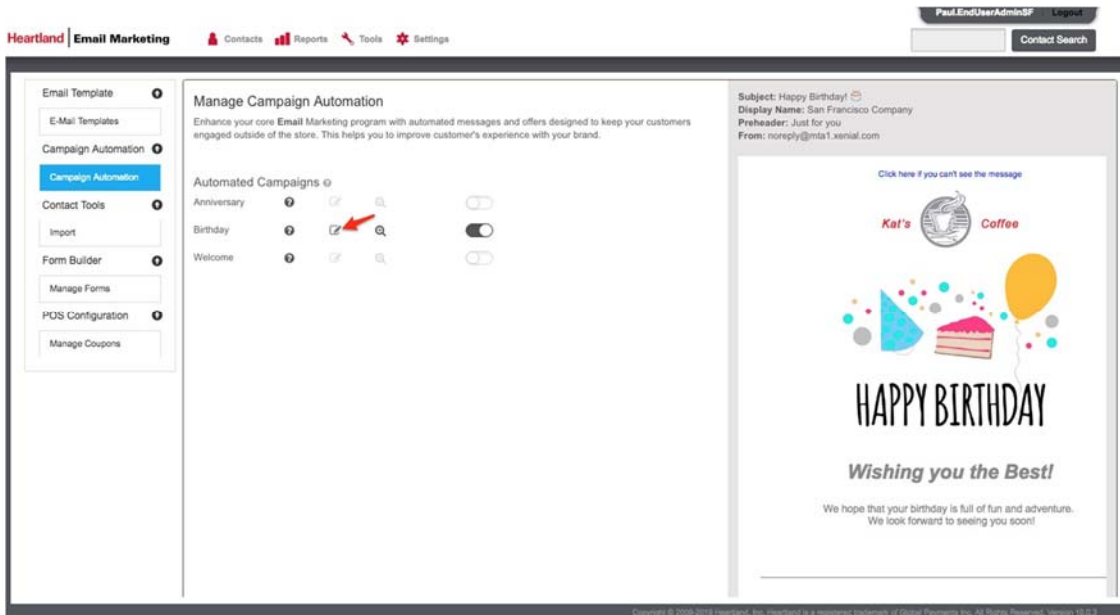




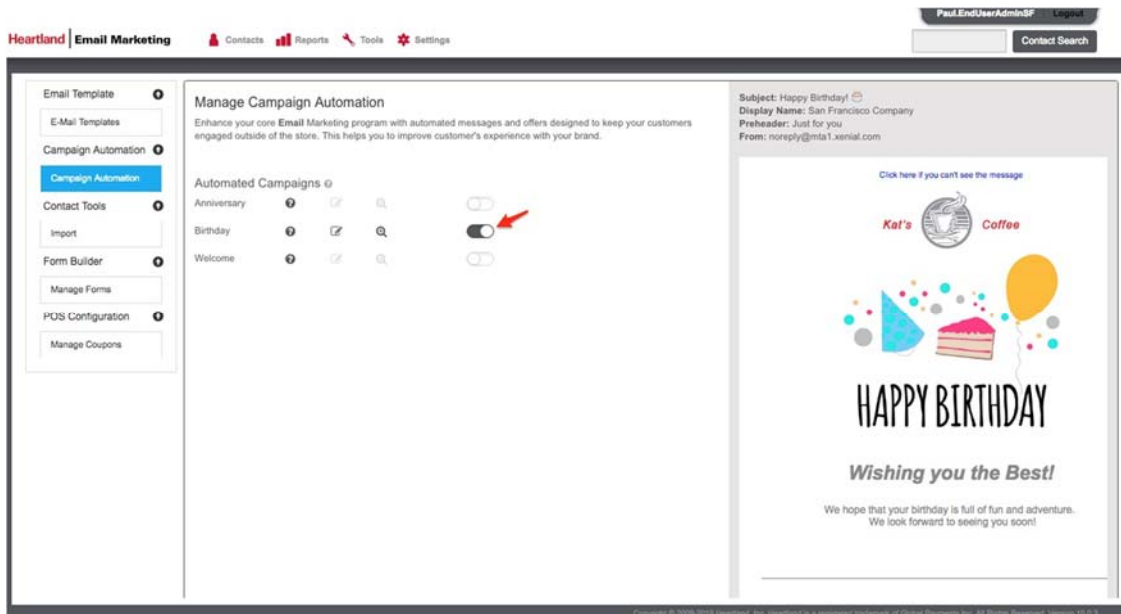
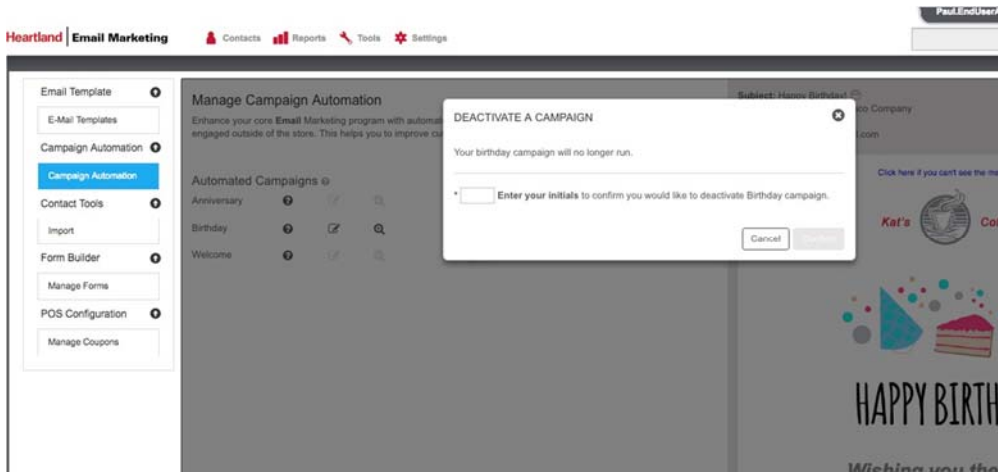
- ▶ Once you setup your automated campaign, you will be sent to the Manage Campaign where you can preview your campaign, edit it, or turn it off completely
- ▶ Preview the campaign details and template by selecting the magnifying icon next to the campaign you wish to preview:



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



- ▶ 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:



Reports

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

Campaign Reports

Scheduled Campaigns

Y Campaign ID	Campaign Name	Scheduled Date	Schedule Type	Created By	Email	Coupon
72045	dmytro.EUA - Test_DL_Scheduled	02/20/2019	Blast	dmytro.EUA	✓	

Executed Campaigns

The executed campaign stats will be processed in full and available for viewing one hour after your campaign is sent.

Y Campaign ID	Campaign Name	Campaign Statistics	Execute Date	Schedule Type	Created By	Email	Coupon
71955	Paul.End.UserAdminSF - Thank you for joining!	1	02/18/2019	Blast	Paul.End.UserAdminSF	✓	
71953	Paul.End.UserAdminSF - Thank you for an amazing year!	1	02/18/2019	Blast	Paul.End.UserAdminSF	✓	
71952	Paul.End.UserAdminSF - Happy Birthday!	2	02/18/2019	Blast	Paul.End.UserAdminSF	✓	✓
70130	Birthday - no coupon	11	01/29/2019	Blast	Paul.DeBafano	✓	
67697	Paul.End.UserAdminSF - have one on us	1	12/13/2018	Blast	Paul.End.UserAdminSF	✓	
67594	Paul.End.UserAdminSF - have one on us	1	12/13/2018	Blast	Paul.End.UserAdminSF	✓	
65040	Paul.PartnerTest - Have one on us!	1	10/26/2018	Blast	Paul.PartnerTest	✓	
64773	Paul.End.UserAdminSF - Have one on us!	1	10/22/2018	Blast	Paul.End.UserAdminSF	✓	
64136	Paul.End.UserAdminSF - Welcome! Thank you for joining!	1	10/11/2018	Blast	Paul.End.UserAdminSF	✓	
64135	Paul.End.UserAdminSF - Welcome! Thank you for joining	1	10/11/2018	Blast	Paul.End.UserAdminSF	✓	
64110	Paul.PartnerTest - Gift Cards Available for the Holiday's!	19	10/11/2018	Blast	Paul.PartnerTest	✓	
64109	Paul.PartnerTest - Have one on us!	2	10/11/2018	Blast	Paul.PartnerTest	✓	✓
64104	Paul.End.UserAdminSF - Dealer Email Marketing	1	10/11/2018	Blast	Paul.End.UserAdminSF	✓	
63985	Paul.PartnerTest - Enjoy One On Us!	2	10/05/2018	Blast	Paul.PartnerTest	✓	✓
63885	Paul.PartnerTest - Have another one on us!	1	10/05/2018	Blast	Paul.PartnerTest	✓	
63875	Paul.End.UserAdminSF - Have one on us!	1	10/05/2018	Blast	Paul.End.UserAdminSF	✓	
63364	Paul.End.UserAdminSF - National Coffee Day - FREE for Reward...	1	09/27/2018	Blast	Paul.End.UserAdminSF	✓	
63286	Paul.End.UserAdminSF - Come in and enjoy Salmon Salads!	1	09/26/2018	Blast	Paul.End.UserAdminSF	✓	
61955	Paul.End.UserAdminSF - Have one on us!	1	08/29/2018	Blast	Paul.End.UserAdminSF	✓	
61304	Paul.End.UserAdminSF - Enjoy one on us!	4	08/17/2018	Blast	Paul.End.UserAdminSF	✓	
61156	Paul.End.UserAdminSF - Special Offer	1	08/15/2018	Blast	Paul.End.UserAdminSF	✓	
59815	Paul.End.UserAdminSF - Enjoy one on us!	13	07/25/2018	Blast	Paul.End.UserAdminSF	✓	✓
58560	Paul.End.UserAdminSF - Enjoy one on us!	1	07/05/2018	Blast	Paul.End.UserAdminSF	✓	
58545	Paul.End.UserAdminSF - Enjoy one on us!	1	07/05/2018	Blast	Paul.End.UserAdminSF	✓	
58541	Paul.End.UserAdminSF - Enjoy one on us!	1	07/05/2018	Blast	Paul.End.UserAdminSF	✓	

Opening Scheduled Campaigns:

Campaign Reports

Scheduled Campaigns

Y Campaign ID	Campaign Name	Scheduled Date	Schedule Type	Created By	Email	Coupon
72045	dmytro.EUA - Test_DL_Scheduled	02/20/2019	Blast	dmytro.EUA	✓	

Executed Campaigns

The executed campaign stats will be processed in full and available for viewing one hour after your campaign is sent.

Y Campaign ID	Campaign Name	Campaign Statistics	Execute Date	Schedule Type	Created By	Email	Coupon
71955	Paul.End.UserAdminSF - Thank you for joining!	1	02/18/2019	Blast	Paul.End.UserAdminSF	✓	

"dmytro.EUA - Test_DL_Scheduled" - Scheduled Campaign

← Back to Campaign Reports

✕ Cancel this Campaign ✓ Edit this Campaign

Your browser timezone is not supported, time is displayed in Eastern Time Zone

Created By: dmytro.EUA
 Campaign ID: 72045
 Date Created: 02/20/2019 5:25:10 AM EST
 Last Updated: 02/20/2019 5:25:10 AM EST
 Scheduled Time: 02/20/2019 6:19:00 AM EST

Actions:

dmytro.EUA - Test_DL_Scheduled_Email
 Template ID: 85009
 Template

List Criteria:

Total Estimated Count: 1

Segmentation:

Group

Email : dmytro.kjovets@dev-pro.net | Email_Open : 1 | Email_Unsubscribe : 0 | Bounce : 0


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

Campaign Name (100 characters or less)*

Scheduled For*
 02/21/2019 5:03:00 PM

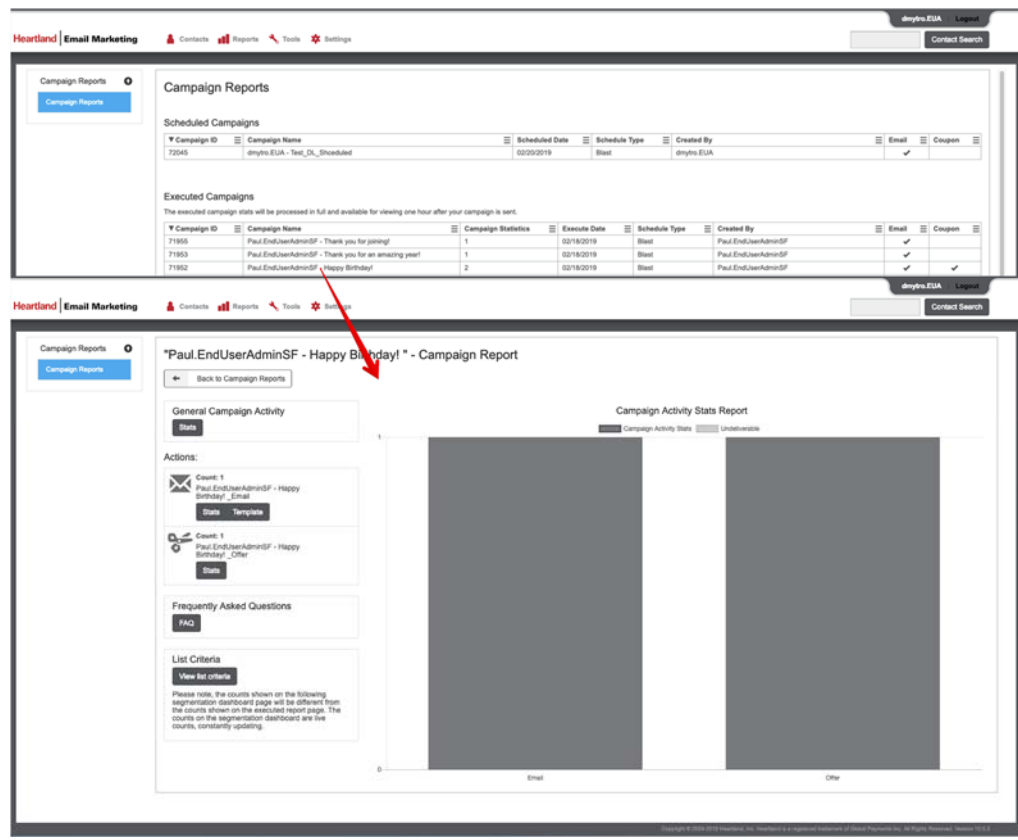
Scheduled Date*


Scheduled Time*
 12 : 03 AM
 Eastern Time Zone

Scheduled datetime in local(browser) timezone
 02/22/2019 7:03:00 AM

* indicates a required field

Opening Executed Campaigns



The screenshot shows the 'Campaign Reports' section with a table of 'Scheduled Campaigns' and 'Executed Campaigns'. A red arrow points from the 'Executed Campaigns' table to the detailed report for the campaign 'Paul.EndUserAdminSF - Happy Birthday!'.

Campaign ID	Campaign Name	Scheduled Date	Schedule Type	Created By	Email	Coupon
72045	dmytro.EUA - Test_Cancel	02/09/2019	Blast	dmytro.EUA	✓	

Y Campaign ID	Campaign Name	Campaign Statistics	Executes Date	Schedule Type	Created By	Email	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	✓	✓

***Paul.EndUserAdminSF - Happy Birthday! - Campaign Report**

General Campaign Activity

Actions:

- Count: 1 Paul.EndUserAdminSF - Happy Birthday! - Email
- Count: 1 Paul.EndUserAdminSF - Happy Birthday! - Offer

Frequently Asked Questions

List Criteria

Please note, the counts shown on the following segmentation dashboard page will be different from the counts shown on the executed report page. The counts on the segmentation dashboard are live counts, constantly updating.

Campaign Activity Stats Report

Bar chart showing Campaign Activity Stats (Email) and Unsubscribed (Offer).

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.

The screenshot shows the 'Manage Coupons' page in the Heartland Email Marketing system. The interface includes a sidebar with navigation options: Email Template, E-Mail Templates, Contact Tools, Import, Form Builder, Manage Forms, POS Configuration, and Manage Coupons (highlighted). The main content area is titled 'Manage Coupons' and features a 'Status:' dropdown menu set to 'Active'. Below this is a table of active coupons with columns for Coupon Code, Coupon Name, Date, and Total Days. A search bar is located above the table. Buttons for 'Add a New Coupon' and 'POS Credentials' are visible in the top right. The table contains the following data:

Coupon Code	Coupon Name	Date	Total Days	
1122	\$5.00 Off Coupon	Apr 9, 2018	60 days	Deactivate
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

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

- ▶ Switch to view deactivated coupons.

The image shows a close-up of the 'Manage Coupons' status dropdown menu. The title 'Manage Coupons' is at the top. Below it, the label 'Status:' is followed by a dropdown menu currently showing 'Active'.

- ▶ 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*

Coupon Code* **Total Active Days*** ✓

Discount % **Discount Amount***

 \$ ✓

Please note, the discount fields above are for information purposes only within this product. The amounts entered here should match to what is entered in the coupon in the POS.

* indicates a required field

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

ADD NEW COUPON ✕

Coupon Name*

Coupon Code* **Total Active Days***

Discount %* **Discount Amount**

 \$

Please note, the discount fields above are for information purposes only within this product. The amounts entered here should match to what is entered in the coupon in the POS.

* indicates a required field

- ▶ 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.

The screenshot shows a dialog box titled "POS CREDENTIALS FOR CRM" overlaid on a coupon management interface. The dialog box contains the following information:

- Below are your POS credentials to be used upon setting up your POS software with CRM.
- URL: [Redacted]
- Username: [Redacted]
- Password: [Redacted]
- Terminals:

Terminal Number	Terminal Name
2018	Location 1

At the bottom of the dialog box is an "OK" button. In the background, a table of coupons is visible with columns for "Coupon Name", "Total Days", and "Deactivate". A red arrow points from the "Add a New Coupon" button in the background to the "POS Credentials" button in the dialog box.

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

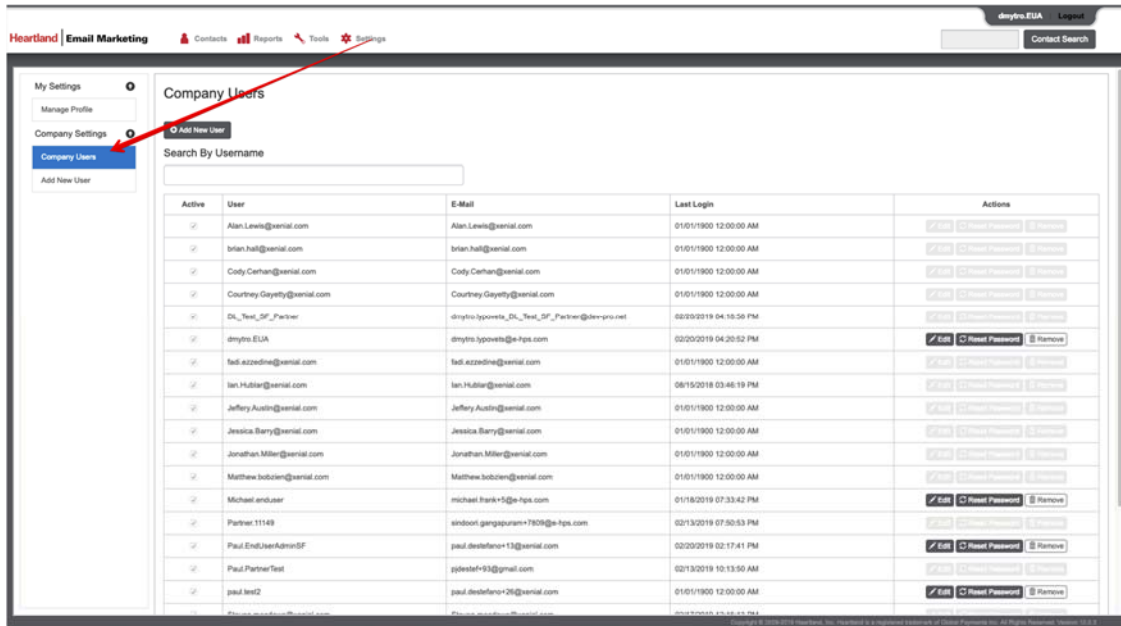
To access this page you need to go to **Settings** section -> **Manage Profile**.

The screenshot shows the 'Manage Profile' page in the Heartland Email Marketing interface. The page is divided into two main sections: 'User Information' and 'Mailing Address'. The 'User Information' section includes fields for Username, Full Name, Title, E-Mail, Phone Number, and Ext. The 'Mailing Address' section includes fields for Address 1, Address 2, Country, City, State, and Zip Code. A 'Change Password' section is highlighted with a red box, containing fields for Old Password, New Password, and Confirm New Password. A 'Submit' button is visible at the bottom right of the form.

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**.



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.

Manage Profile

<p>User Information</p> <p>Username* dmytro.EUA</p> <p>Full Name* dmytro.lypovets</p> <p>Title Vice President</p> <p>E-Mail* dmytro.lypovets@e-hps.com</p> <p>Phone Number 555-485-3847</p> <p>Ext 12345</p>	<p>Mailing Address</p> <p>Address 1 23 White Haggard Avenue</p> <p>Address 2 4th Floor, Suite 405</p> <p>Country* United States</p> <p>City New York</p> <p>State* Alabama</p> <p>Zip Code 79185</p>
---	---

User Security Roles*

EndUserAdmin

*Indicates a required field

- ▶ 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).

The screenshot shows the 'Create a New User Account' form in the Heartland Email Marketing interface. The form is divided into three main sections: User Information, Mailing Address, and User Security Roles. A red arrow points to the 'Add New User' button in the left sidebar.

User Information

- Username*: john.doe
- Full Name*: John Doe
- Title: Vice President
- E-Mail*: john.doe@example.com
- Phone Number: 555-445-3347
- Ext: 12345

Mailing Address

- Address 1: 23 White House Avenue
- Address 2: 4th Floor, Suite 406
- Country*: United States
- City: New York
- State*: Alabama
- Zip Code: 78165

User Security Roles*

- EndUserAdmin

* Indicates a required field

Buttons: Submit, Cancel

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.