

Chapter 4.22 - Including Flyers/Promos in Emails from Route Manager

Introduction

Have you ever wanted to send a flyer or promo piece along with your email communications to your customers? Now you can!

You'll be able to send a PDF Attachment of your promo or flyer with the following types of email communications in Route Manager:

- ▶ Statements
- ▶ Invoice Copies
- ▶ Customer Message Centre
- ▶ Delivery Calendars
- ▶ Standard customer emails from the *Info* tab

Overview

In order to include attachments in general to you emails, there are a few rules that must be followed:

- ▶ The attachment must be in a .PDF format.
- ▶ The attachment must be saved in the proper folder.

The remaining sections within this document will guide you through this process.

Saving in PDF Format

In order for the attachment flyer/promo to be included in your email, you will need to save the flyer in .PDF format. A .PDF file (Portable Document Format) was invented by Adobe Systems over 17 years ago, and has become a staple in internet documents.

In order to save a flyer to the .PDF format, you must first install a 'PDF Printer' on your computer. You

can obtain this tool from a number of free and paid software titles.

Here are a few recommended sources:

- ▶ Adobe Acrobat (Visit Adobe.com for purchasing info)
- ▶ BullZip – A free alternative to Adobe Acrobat that lets you create a .PDF just by converting a print job sent to the BullZip PDF printer.
- ▶ CutePDF – Another free PDF alternative.

Once you have the PDF tool installed, you will create a flyer or promotional item in the software you would normally use (Microsoft Word, etc.). Once you have completed this document, you will need to convert it to a .PDF file.

For the above noted PDF Converters, this is done by simply “printing” the document and choosing the PDF Printer/Converter that was installed. The program will then prompt you to save the PDF copy of your document on your computer.

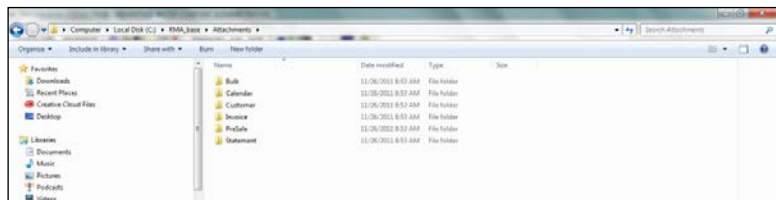
NOTE: Make note of where you saved the new file, as you will need to copy the file to another location later in this process.

Attachment File Location(s)

When sending an Email from Route Manager, it automatically checks a specified folder to see if there are any .PDF documents to include with the email.

This folder is labeled ‘Attachments’ and can be found within the RMA root folder -- typically found under X:\RMA\Attachments. If you are not sure where to find the RMA folder you can right click on your shortcut to Route Manager and choose the *Properties* option and you will be able to view the target location on the shortcut tab.

Once you locate the Route Manager Folder, open up the ‘Attachments’ folder by double clicking on it. You should have a number of available subfolders.



These subfolders are where you will store your .PDF promotions/flyers based on the following categories:

- ▶ **Bulk:** This folder is not currently in use -- please leave empty.
- ▶ **Calendar:** Place your PDF file in this folder to include the flyer when sending *Delivery Calendars*.
- ▶ **Customer:** Place your PDF file in this folder to include the flyer when sending from the little yellow envelope next to the Email field in *Customer Information*.
- ▶ **Invoice:** Place your PDF file in this folder to include the flyer when sending customers copies of their invoices from *Customer Information > \$ Tab > Invoice Lookup*.
- ▶ **PreSale:** Place your PDF file in this folder to include the flyer when sending emails via the *Modules > Customer Message Centre > Generate Messages* tool.
- ▶ **Statement:** Place your PDF file in this folder to include the flyer when sending email statements to customers.

Once the document is placed in the proper folder, it will automatically be emailed EVERY TIME you send an email from the corresponding area of Route Manager and the customer is set to the 'As Attachment' email type. To stop including the promotional attachment with your emails, remove the PDF file from the corresponding folder.

Summary

Emailing promotions and flyers are a great way to effectively communicate with your customers at little to no additional advertising costs. Using the tools explained in this document can help you increase your communication with your customers, provide better service, and most importantly, sell more products.

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Printed in the United States of America.

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Series 7: Version Date, May 4, 2016