

Point® users can now market and grow business right from Point with a few clicks of the mouse. New tools allow Point users to create custom letters, newsletters, promotional emails, and mailing labels instantly using Point data. It's easy to build, merge, e-mail, or print beautiful media-rich documents certain to impress your clients – all from within Point!

(Microsoft Word® 2000 or later is required. Microsoft Outlook® 2000 or later is required to send E-Mail campaigns.)

Creating a Marketing Campaign in Point:

There are two steps to creating a Marketing Campaign in Point.

1. The first step is to setup a Report & Marketing Template containing all of the information that will appear on your Marketing documents.
2. The second step is running your Marketing Report which will be covered in the next section. To start, click the 'Templates' tab on the Navigation Panel, then click "Reports & Marketing." Select a Marketing Report from the list and click "Open." You will then arrive at the Reports & Marketing Template screen.

In the Reports & Marketing Template screen below you can set up your Mail Merge Marketing Documents using the "Use Result for Mail Merge Marketing Documents" option at the bottom of the screen. You can link as many documents as you would like within one report template by adding any combination of Letter, Label, or E-Mail campaigns.

Report and Marketing | Template

Report Title: Property Labels

Description: This Property Address Label is used to generate a list of Borrowers and Co-Borrowers for label printing. You can use additional items for displaying only a certain month for birthday cards.

Field Name	Field ID	Condition	Show	Total	Format	Width
1 Borrower First Name	100	...	<input checked="" type="checkbox"/>		Auto	Auto
2 Borrower Last Name	101	...	<input checked="" type="checkbox"/>		Auto	Auto
3 Subject Property Address	31	...	<input checked="" type="checkbox"/>		Auto	Auto
4 Subject Property City	32	...	<input checked="" type="checkbox"/>		Auto	Auto
5 Subject Property State	33	...	<input checked="" type="checkbox"/>		Auto	Auto
6 Subject Property Zip Code	34	...	<input checked="" type="checkbox"/>		Auto	Auto
7 Occupancy (Code)	1240	...	<input checked="" type="checkbox"/>		Auto	Auto
8		...	<input checked="" type="checkbox"/>		Auto	Auto
9		...	<input checked="" type="checkbox"/>		Auto	Auto
10		...	<input checked="" type="checkbox"/>		Auto	Auto
11		...	<input checked="" type="checkbox"/>		Auto	Auto
12		...	<input checked="" type="checkbox"/>		Auto	Auto
13		...	<input checked="" type="checkbox"/>		Auto	Auto
14		...	<input checked="" type="checkbox"/>		Auto	Auto

Sort Options

Sort by: Borrower Last Name Ascending Descending Group By Page break

Then by: (none) Ascending Descending Group By

Then by: (none) Ascending Descending Group By

Output Options

Display Result in Point Report Viewer

Permissions: Allow Editing Allow Saving Allow Printing

Paper Size: Letter Legal

Paper Orientation: Landscape Portrait Display Report

Display Result in Excel

Result in a new Excel file

Result in a pre-formatted Excel file

File: [] New

Worksheet: Export to: [] Launch with: []

Display within Point

Use Result For Mail Merge Marketing Documents

Add new link or edit the existing link to mail merge documents for marketing contents

Type	Document	Subject	
Label	Avery Label - 15162		Add Link...
Email	Calyx Marketing - Custom Letter - Contact Information Upda...	Contact Inform	Edit Link...
Letter	Calyx Marketing - Custom Letter - Current Market Informatio...		Unlink

Eliminate duplicates Based On: Borrower SSN Co-Borrower SSN Use: Latest Open Date Latest Closed Date

Report & Marketing Template Screen

When clicking “Add Link” or “Edit Link” within the image above, the following screen will appear that enables you to setup Custom Letters, Mailing Labels, and Email templates. In this screen you set up fields that will appear in your Mailing Labels as well as the Letters or E-Mails you would mail merge to the report data.

Marketing Document and Options

Document Type: Mailing Label Email Custom Letter

Match Fields
Use the drop-down list to select the appropriate Point field for each address field component. If you don't see Point fields you want to match in the drop-down, please go back to the Report template screen and add them into the field list.

First:	<input type="text" value="Borrower First Name"/>	Addr1:	<input type="text" value="Subject Property Adr"/>	Additional Recipient Name
Last:	<input type="text" value="Borrower Last Name"/>	Addr2:	<input type="text"/>	First: <input type="text"/>
Middle:	<input type="text"/>	City:	<input type="text" value="Subject Property City"/>	Last: <input type="text"/>
Suffix:	<input type="text"/>	State:	<input type="text" value="Subject Property Sta"/>	Middle: <input type="text"/>
Company:	<input type="text"/>	Zip:	<input type="text" value="Subject Property Zip"/>	Suffix: <input type="text"/>

Email Options
Subject: Email Address Field:

Mailing Label Templates
Select a Mailing Label Template to use for the address labels

- [Select when generating]
- Avery Label - 15160
- Avery Label - 15162
- Avery Label - 15660
- Avery Label - 15662
- Avery Label - 18160
- Avery Label - 18162

Buttons: Create New..., Edit..., OK, Cancel

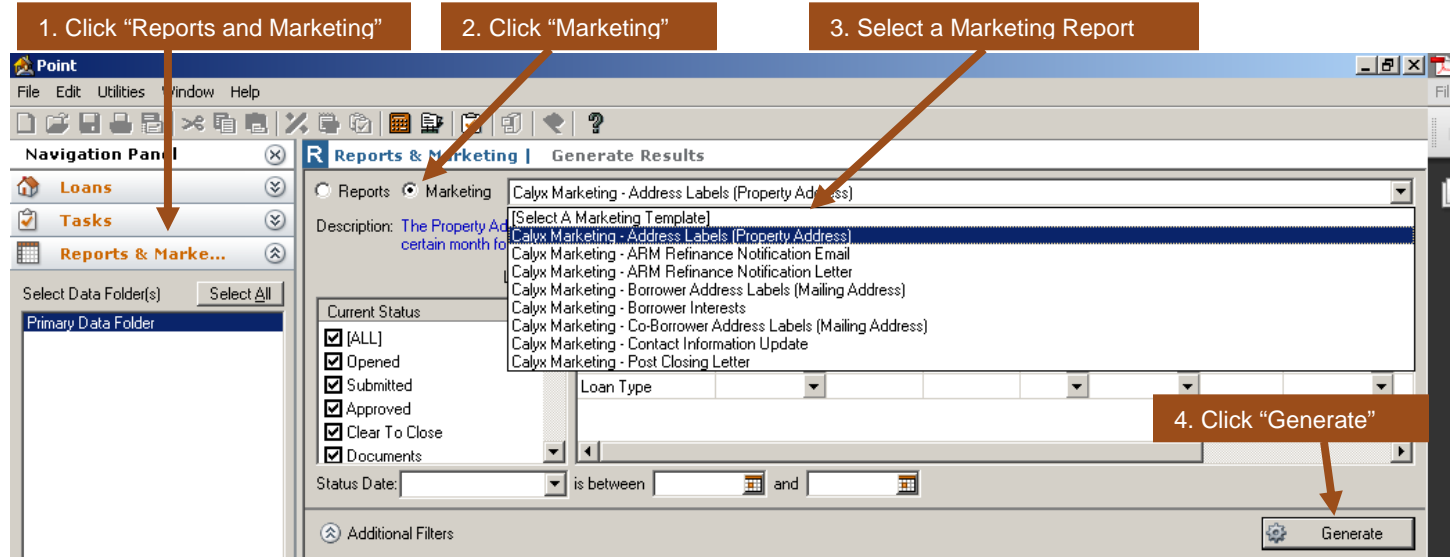
Marketing Document & Options Screen

If you are unfamiliar with setting up Report & Marketing Templates, please refer to the Point User Guide chapter titled, “Reports and Marketing Documents.”

Running Your Marketing Report

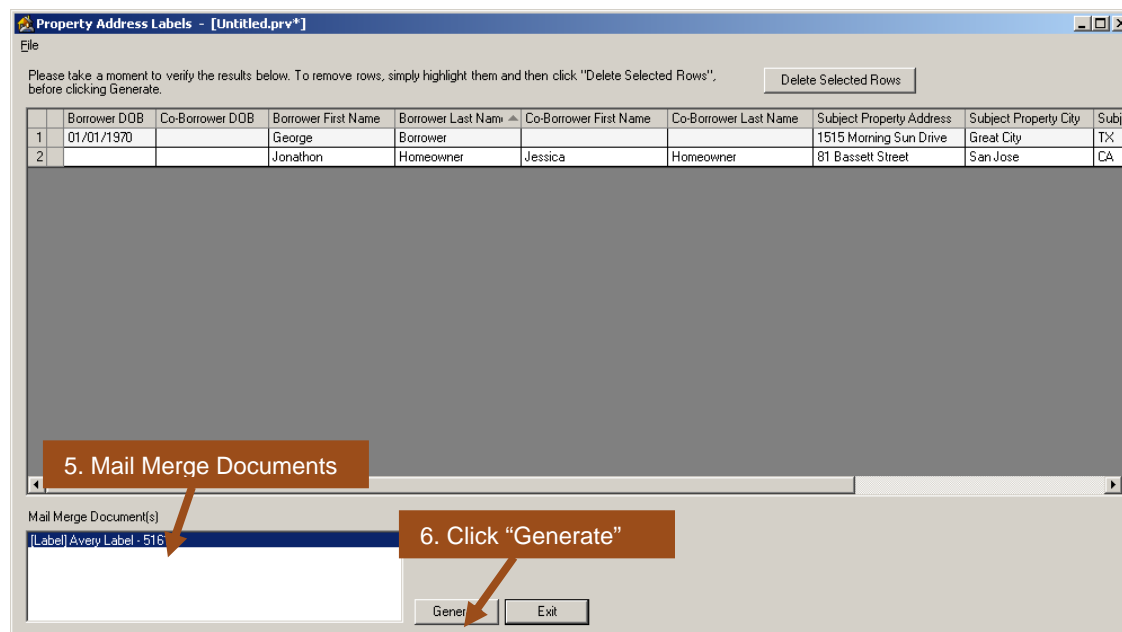
After setting up your Marketing Template, you can now run your Marketing Report. Creating a Marketing Campaign is an easy 6-step process, outlined below:

Click the “Reports & Marketing” tab. The Reports & Marketing screen will appear. Two radio button options will appear: Reports and Marketing. Click the “Marketing” radio button. Select the data folders and file types (Borrower, Prospect, or both) you want the data pulled from. From the Template dropdown, select a Calyx Marketing Report or a custom one that you created. You can use any of the Status or any other filters to narrow your dataset. Click the “Generate” button.



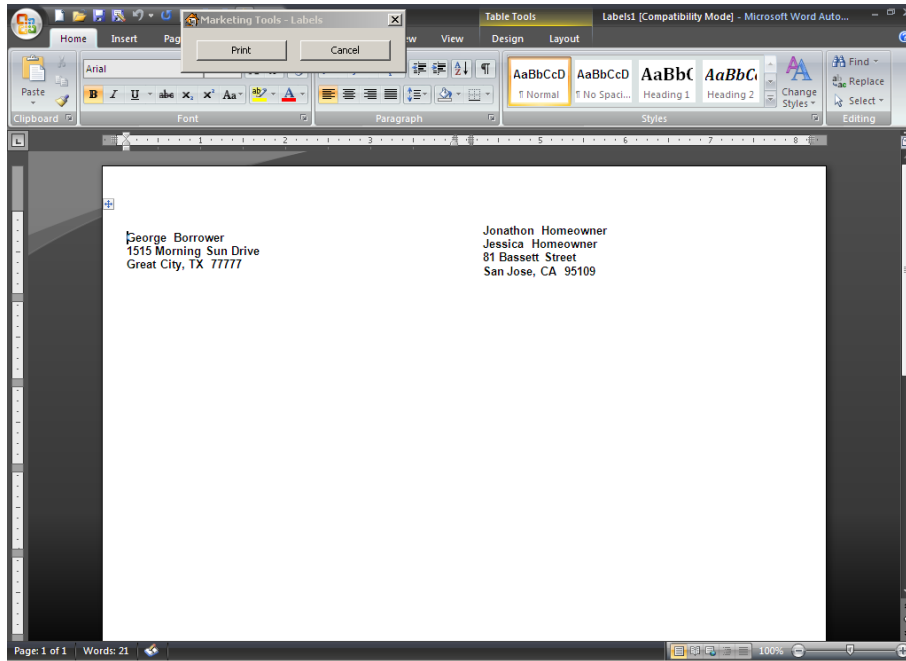
Reports & Marketing Screen

The generated Report will appear. From here, you can modify the Report by deleting any files that you don't want to appear in the list. Now click the Mail Merge Document you want to run from the list in the bottom left corner of the window. Click the “Generate” button.

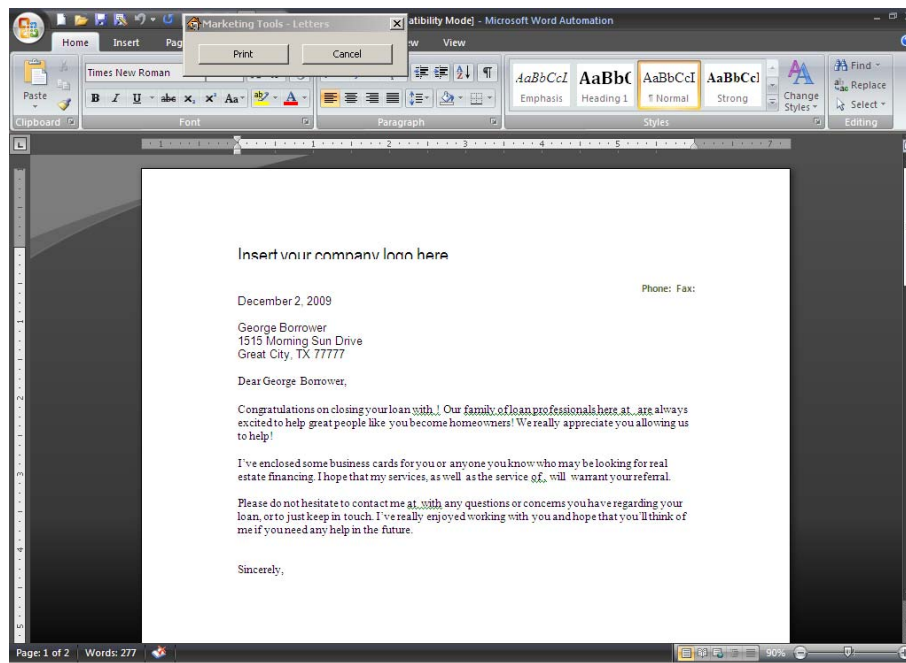


Results Screen

The Mail Merge document you selected will appear. Below are examples of the Address Labels, Letter & Email Mail Merge documents.



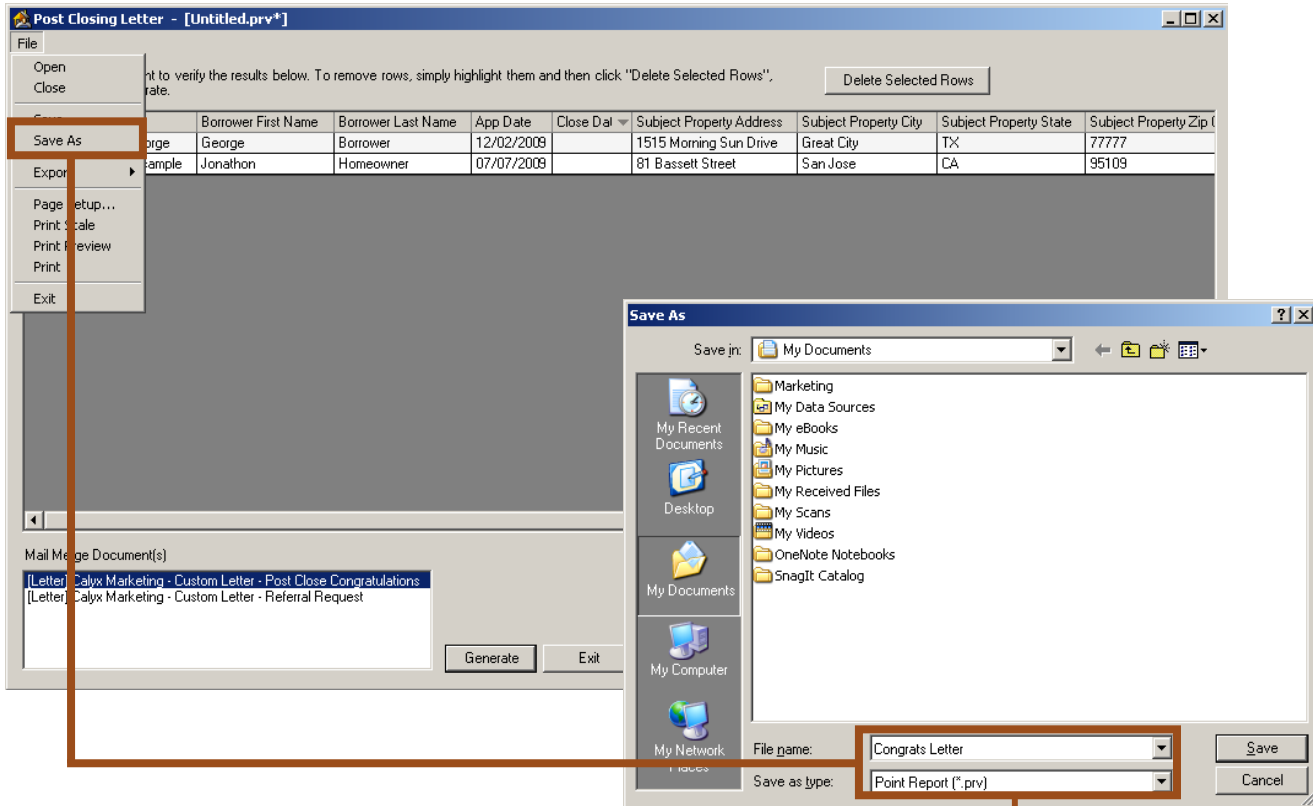
Address Labels



Letters & emails (emails will be sent to MS Outlook)

Creating a Marketing Campaign in Point:

You can save the Report you ran to modify it later, e-mail it someone else, or archive the data you ran for that Marketing campaign. Once the report is generated, click File > Save As and give the file a name. You can save the file anywhere on your computer. A file will be created called "<filename.prv> with whatever file name you chose. Once the file is saved, you can open this file and the same Report screen will appear with all of your loan files and Mail Merge documents attached. You can continue your modifying your list and printing your documents right where you left off.



Results Screen with Save As Feature

