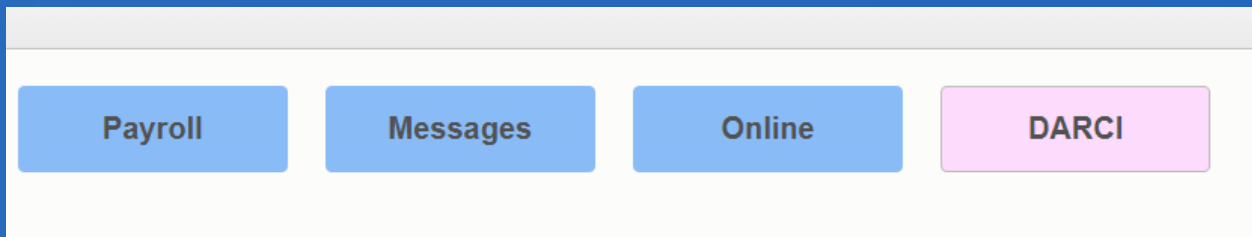


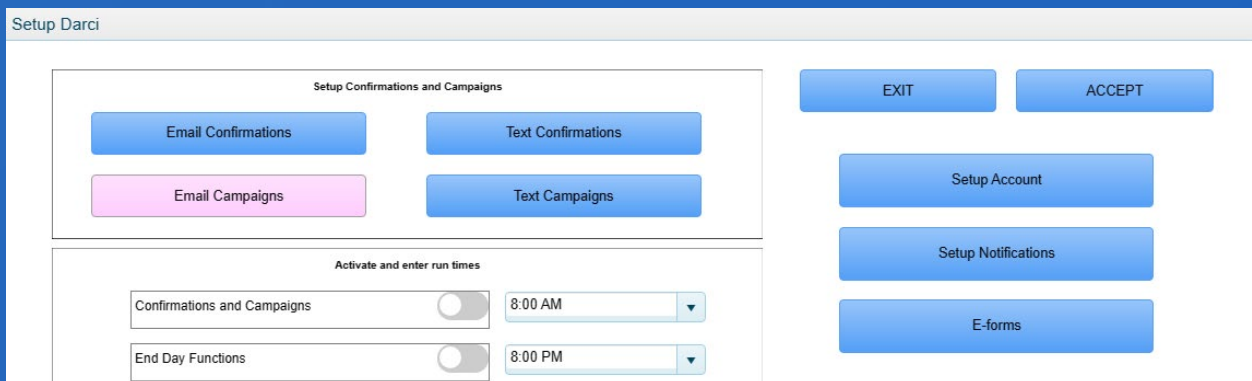
DARCI Follow Up Email

In this tutorial we will cover creating a 'Follow Up' campaign which will be sent out after the client's appointment. These instructions can also be used for 'Follow Up New Only'

1. From the main screen, click DARCI



2. Click 'Email Campaigns'



3. (A) Select the 'Follow Up' template from the drop down.

(B) Make this template active by clicking the 'Active' box.

(C) Select how many email messages you would like to send out. In this first example we will just choose 1 but we will come back to this at the end to explain what more than one would look like.

(D) Choose how many days in AFTER their appointment you would like this email to go out. In this example we will choose 7 which means your client will receive this email a week after their service.

(E) Click the '1st Message' button to begin setting up your email message.

The screenshot shows the 'Blast Marketing Messages' interface. It includes a title bar, an 'Email Message' section with a 'Template' dropdown set to 'Follow Up' (annotated with A), an 'ACTIVE' toggle switch (annotated with B), and buttons for 'Exit' and 'Save Template'. Below this is the 'Number of campaigns to run' dropdown set to '1' (annotated with C). A text box explains: 'Messages will be sent out based on the number of Days in Advance. Select 0 to send the message out the day of the event.' At the bottom, there is a 'Days in Advance' dropdown set to '7' (annotated with D) and a '1st Message' button (annotated with E).

4. (A) Choose the font and size you would like for your message.

(B) These are the codes you can use to insert specific information into your message. For example, by typing "How did you like your service, <CF>?" into the subject line it will display the customer's first name automatically ie. " How did you like your service, Stephen?"

(C) Choose the font color (this is black by default)

(D) Choose the font's background color (this is white by default)

(E) Inserting a hyperlink allows you to enter a website's URL into the message but also have it display a different message than the URL (ie. Click Here to be taken to your businesses' website)

(F) The image button will allow you to insert the URL to a specific image and have it display in your message directly from the internet. If the image resides on your computer, you can simply drag and drop it into this screen and it will automatically display.

The screenshot shows a web form titled "Set Message and Image". It includes a "message number" field (value: 1), a "Subject" field (value: "How did you like your service, <CF>?"), and a large text area for the message body. A toolbar above the text area contains various formatting options: font face (Arial, Helvetica, ...), font size (3 (12pt)), bold (B), italic (I), underline (U), text color (A), background color (D), link (E), and image (F). A legend box at the bottom left explains the codes: <BUSINESS> for Business Name, <CF> for Client's FIRST Name, <CL> for Client's LAST Name, <BD> for Birth Date, and <AV> for Anniversary Date. An "Attach Survey" toggle is located at the bottom right. Buttons for "Save", "Exit", and "Send Test" are also present.

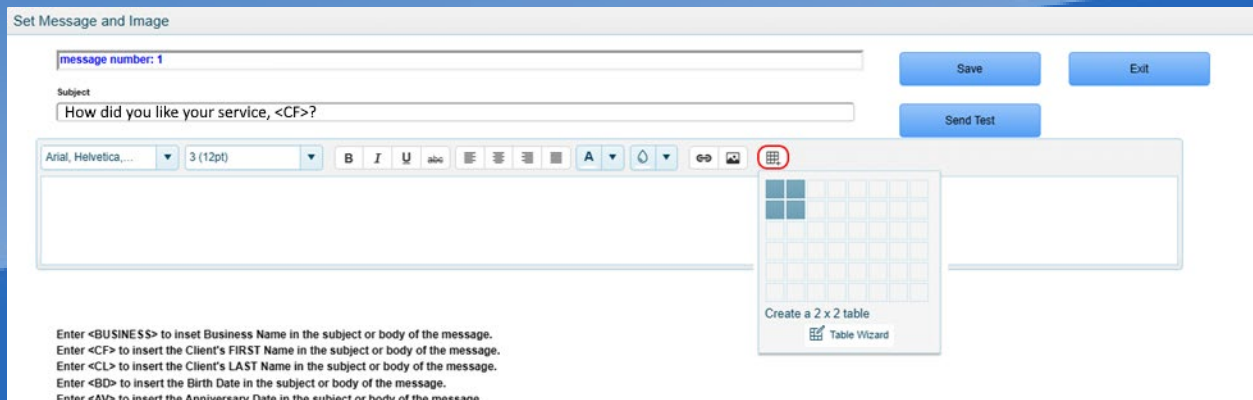
A Arial, Helvetica, ... 3 (12pt)

C A **D** **E** **F**

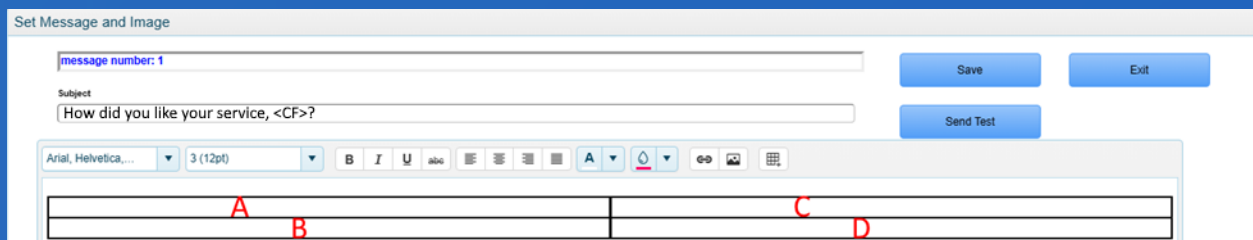
B Enter <BUSINESS> to inset Business Name in the subject or body of the message.
Enter <CF> to inset the Client's FIRST Name in the subject or body of the message.
Enter <CL> to inset the Client's LAST Name in the subject or body of the message.
Enter <BD> to inset the Birth Date in the subject or body of the message.
Enter <AV> to inset the Anniversary Date in the subject or body of the message.

Attach Survey

5. The Table Wizard allows you to customize the format of the message box from one square up to a 6x8 table. In this example we will use a 2x2 table.



6. You now have up to 4 different images/text boxes to use when making your campaign email.



7. In the example below, we have dragged two images that were on our computer into the “A” and “C” boxes and then typed corresponding messages into the “B” and “D” boxes.

Set Message and Image


message number: 1


Subject
How did you like your service, <CF>?

Save Exit

Send Test

Arial, Helvetica, ... 3 (12pt) B I U abc [font icons]


Spa Services
Book your next service within the next 3 days and receive 15% off!


Salon Services
Book your next service within 3 days and receive 15% off!

Attach Survey

Enter <BUSINESS> to inset Business Name in the subject or body of the message.
Enter <CF> to inset the Client's FIRST Name in the subject or body of the message.
Enter <CL> to inset the Client's LAST Name in the subject or body of the message.
Enter <BD> to inset the Birth Date in the subject or body of the message.
Enter <AV> to inset the Anniversary Date in the subject or body of the message.

8. You must first click ‘Save’ before sending yourself a test. If the test email looks great, you’re good to go! Just Exit all the way out.

Set Message and Image


message number: 1


Subject
How did you like your service, <CF>?

Save Exit

Send Test

Arial, Helvetica, ... 3 (12pt) B I U abc [font icons]


Spa Services
Book your next service within the next 3 days and receive 15% off!


Salon Services
Book your next service within 3 days and receive 15% off!

Attach Survey

Enter <BUSINESS> to inset Business Name in the subject or body of the message.
Enter <CF> to inset the Client's FIRST Name in the subject or body of the message.
Enter <CL> to inset the Client's LAST Name in the subject or body of the message.
Enter <BD> to inset the Birth Date in the subject or body of the message.
Enter <AV> to inset the Anniversary Date in the subject or body of the message.

9. If you wish to send more than one message, you can change the 'Number of campaigns to run' to a number larger than 1. In this example, we've chosen 2 and set the 1st Message to be sent 3 days AFTER the client's appointment and the 2nd Message will be set to 7 which means it will go the following week. You must configure the 2nd Message in the same manner you did the first.

Blast Marketing Messages

Email Message

Template: Follow Up

ACTIVE

Exit

Save Template

Number of campaigns to run: 2

Messages will be sent out based on the number of Days in Advance. Select 0 to send the message out the day of the event.

1st Message: 3 Days in Advance

2nd Message: 7 Days in Advance

10. Please note that all campaigns go out at the same time each day as your appointment reminders. This is setup in the main DARCI screen.

Setup Darci

Setup Confirmations and Campaigns

Email Confirmations

Text Confirmations

Email Campaigns

Text Campaigns

EXIT

ACCEPT

Setup Account

Setup Notifications

E-forms

Activate and enter run times

Confirmations and Campaigns: 8:00 AM

End Day Functions: 8:00 PM