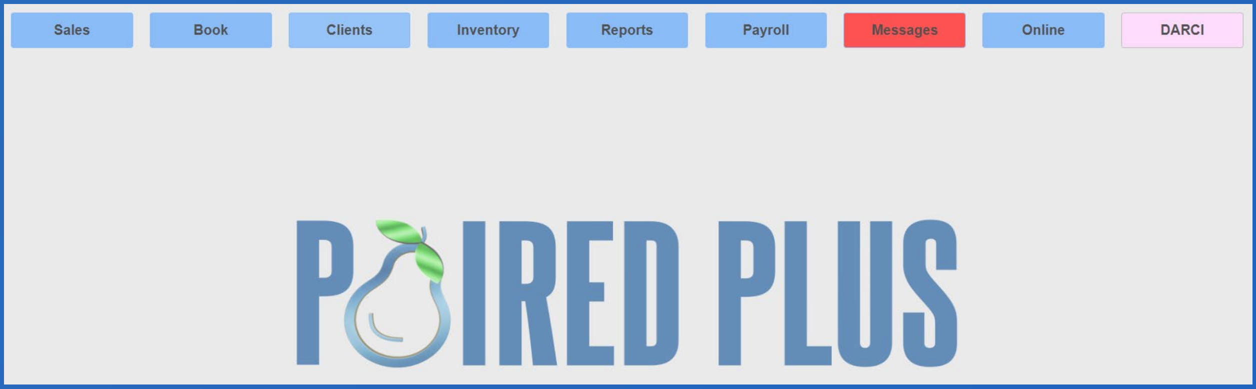
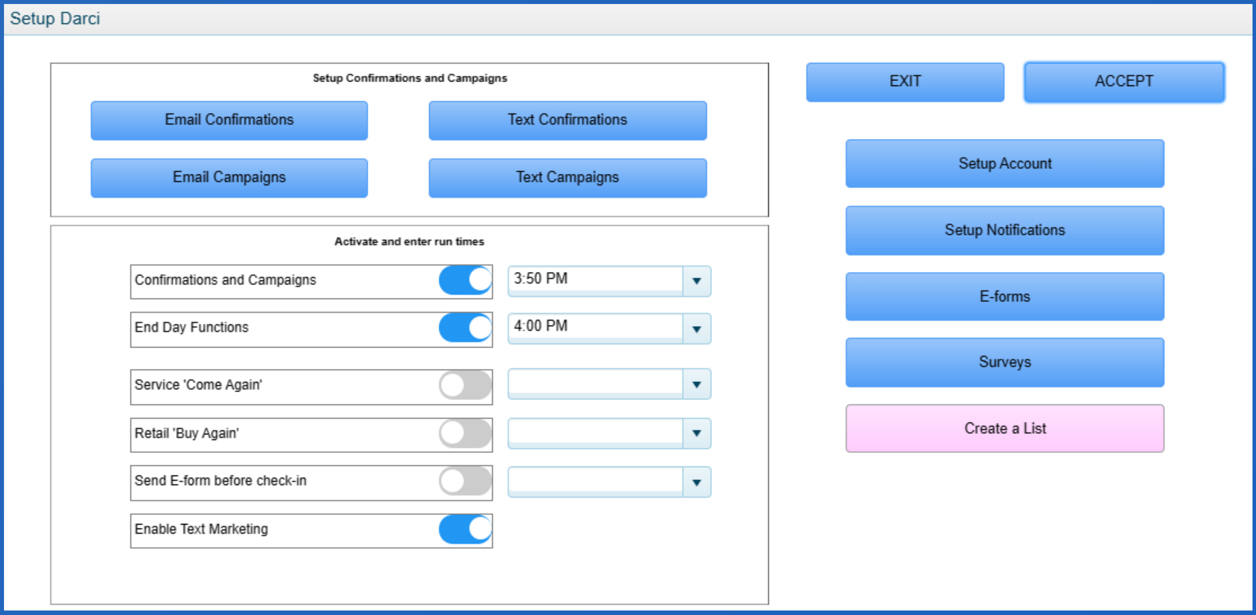
Creating a Marketing List

Marketing lists create lists of clients based upon an array of options which can be used to send email and text blasts directly through Paired Plus, or downloaded to import into a 3rd party email system.

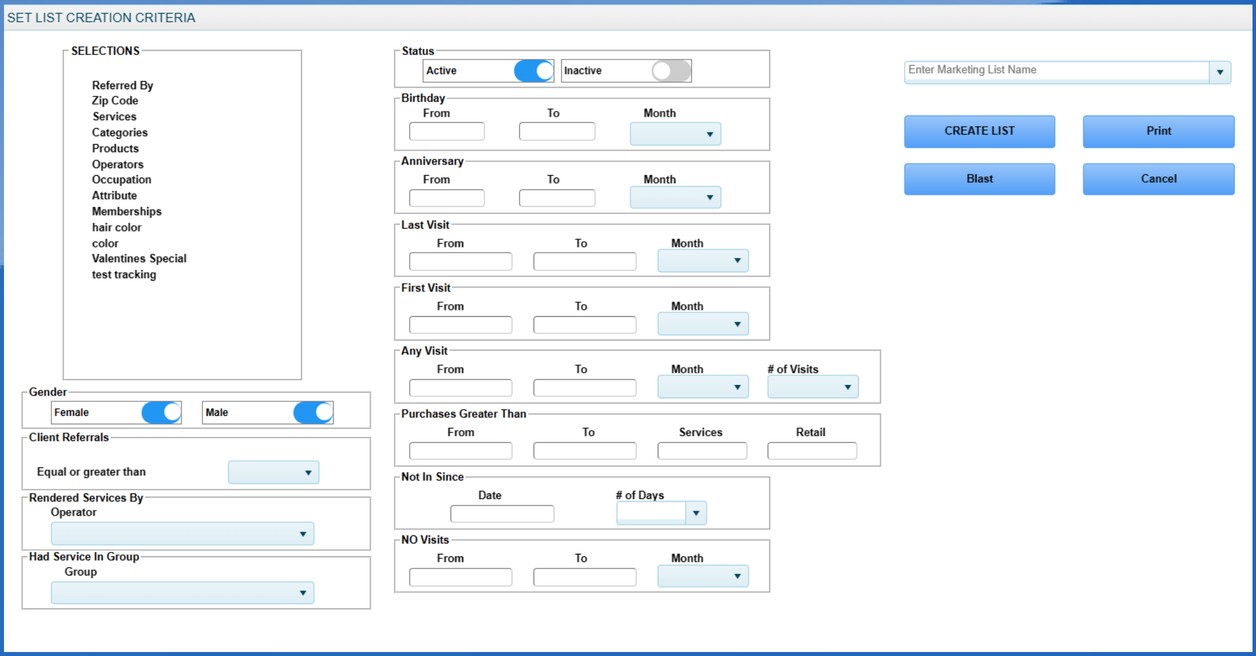
1. From the main screen, click DARCI



2. Click ‘Create a List’



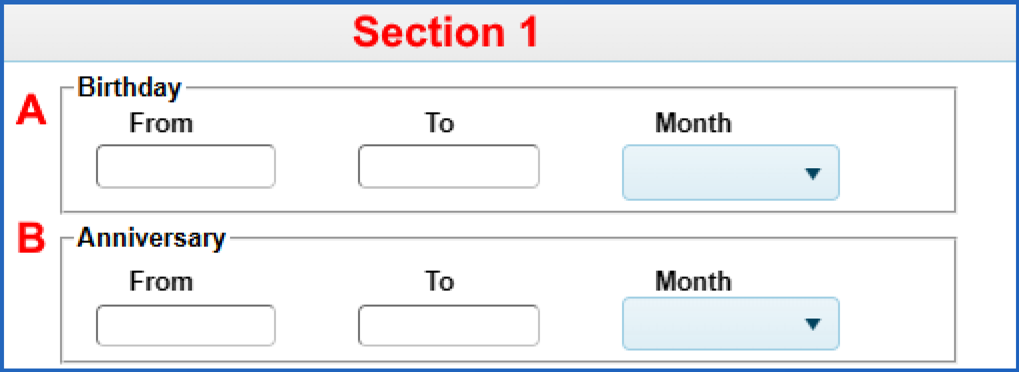
3. Lists can be created using lots of different criteria. In this document we will first briefly cover all the options before going into the specifics of creating individual lists.



4. Section 1

A) **Birthday:** Use the 'From' and 'To' fields to enter a date range. Regardless of the year selected within the calendar that pops up, these fields will only use the month range selected. If you wish to only use a single month range, use the 'Month' drop down.

B) **Anniversary:** Use the 'From' and 'To' fields to enter a date range. Regardless of the year selected within the calendar that pops up, these fields will only use the month range selected. If you wish to only use a single month range, use the 'Month' drop down.

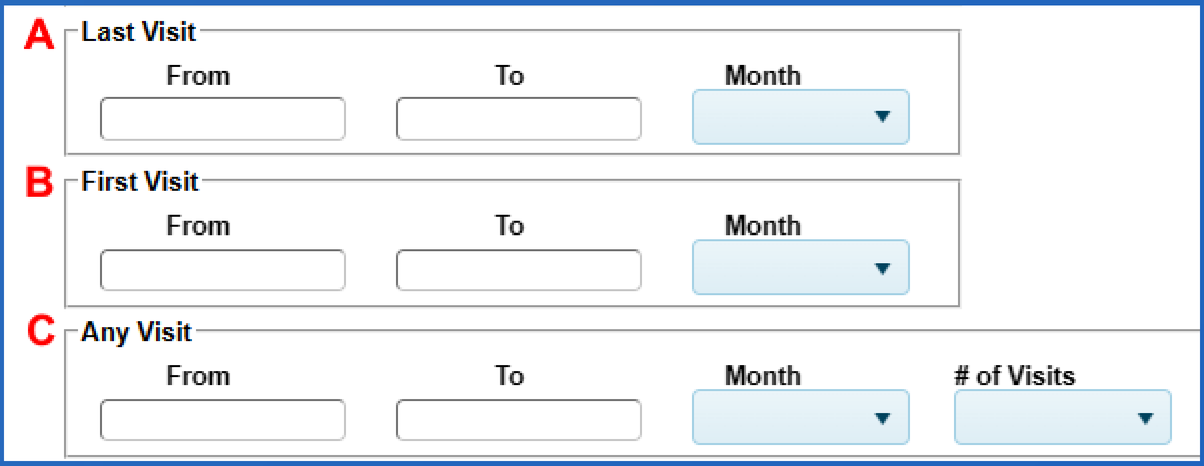


5. Section 2

A: **Last Visit:** Allows you to use a date range and pulls from the 'Last Visit' field in the client profile which is updated every time a customer is checked out through the sales screen, not just booked. The 'Month' drop down will use a full month range for the current year only.

B: **First Visit:** Allows you to use a date range and pulls from the 'First Visit' field in the client profile which is updated the first time a customer is checked out through the sales screen, not just booked. The 'Month' drop down will use a full month range for the current year only.

C: **Any Visit:** Allows you to use a date range and pulls from both the 'First Visit' and 'Last Visit' fields in the client profile. The 'Month' drop down will use a full month range for the current year only. When selected, the '# of Visits' requires the client to have been checked out at least as many times as selected, within the date range selected.

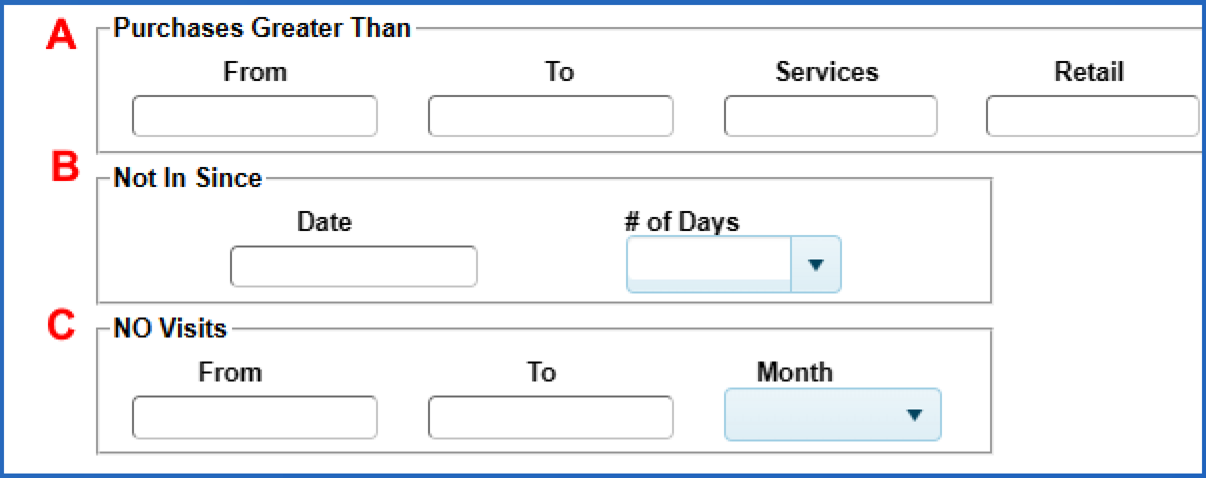


6. Section 3

A: **Purchases Greater Than:** Pulls from sales at checkout and allows you to enter a date range that the ‘Service’ and ‘Retail’ amounts must have fallen within. Please note that if you entered both service and retail amounts and a client only qualified for one amount but not the other, they will not qualify for this list.

B: **Not In Since:** Allows you to enter an individual date or a ‘# of days.’ Any client who came in before the date entered, but not after, will qualify. (i.e. If I selected 12/31/23, a client whose last visit was 04/15/18 would qualify)

C: **No Visits:** Will only include clients who were NOT checked out through the sales screen within the date range selected.



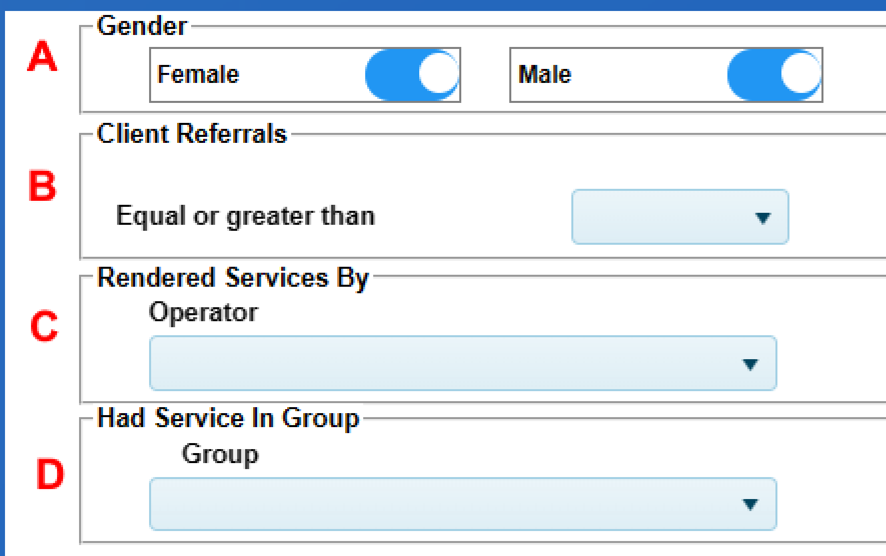
7. Section 4

A: **Gender**: Allows you to specify only females, males, or both.

B: **Client Referrals:** Are accumulated within the client profile by selecting 'Referred by Friend' and choosing the referring client. Each time that client is selected, their referred count increases by 1.

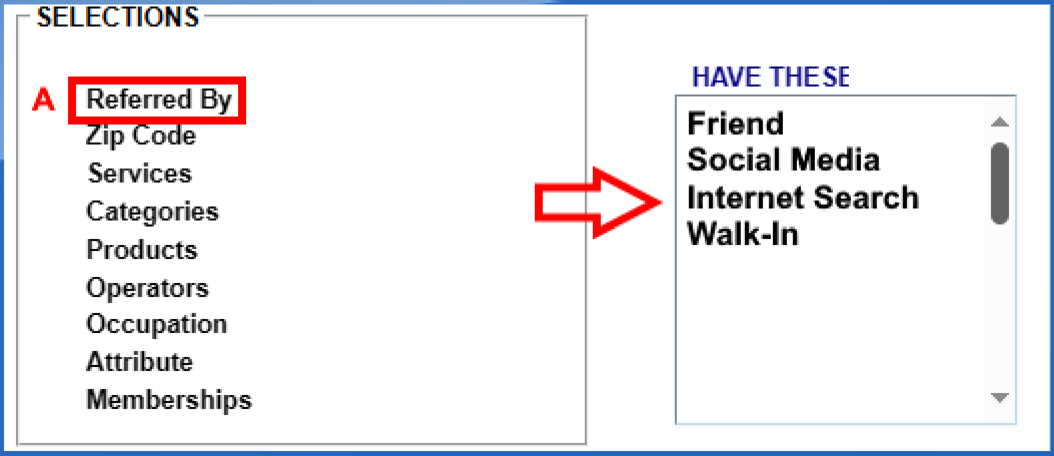
C: **Rendered Services by Operator:** Will qualify anyone the selected operator has ever seen. This option can be used in conjunction with any other option within sections 1-4 which means the client will need to match all the options in order to qualify for the list.

D: **Had Services in Group:** Will qualify clients that have had any services within the selected group. This option can be used in conjunction with any other option within sections 1-4 which means the client will need to match all the options in order to qualify for the list.

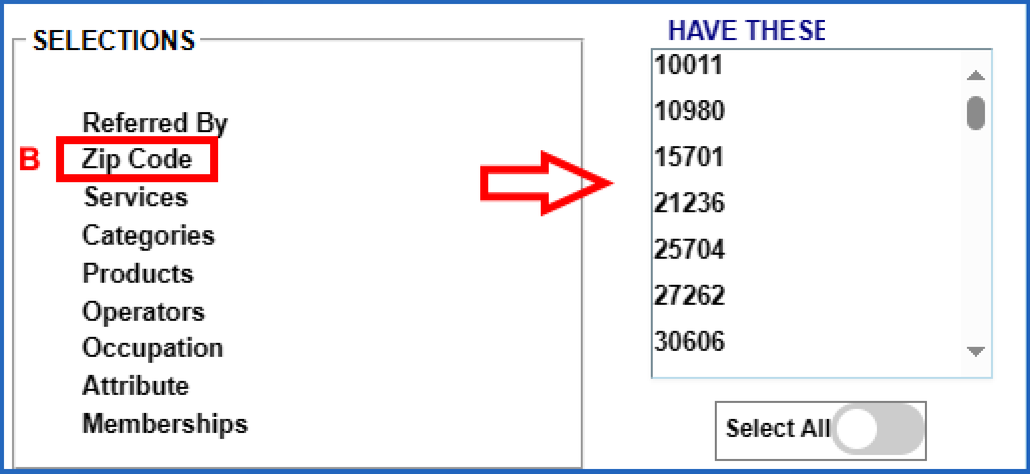


8. **Section 5**

A: **Referred By:** Pulls from the client profile and can be modified to meet your specific needs. If you make more than one selection in this screen, a client can be referred by ANY of the selections highlighted and qualify for this list.



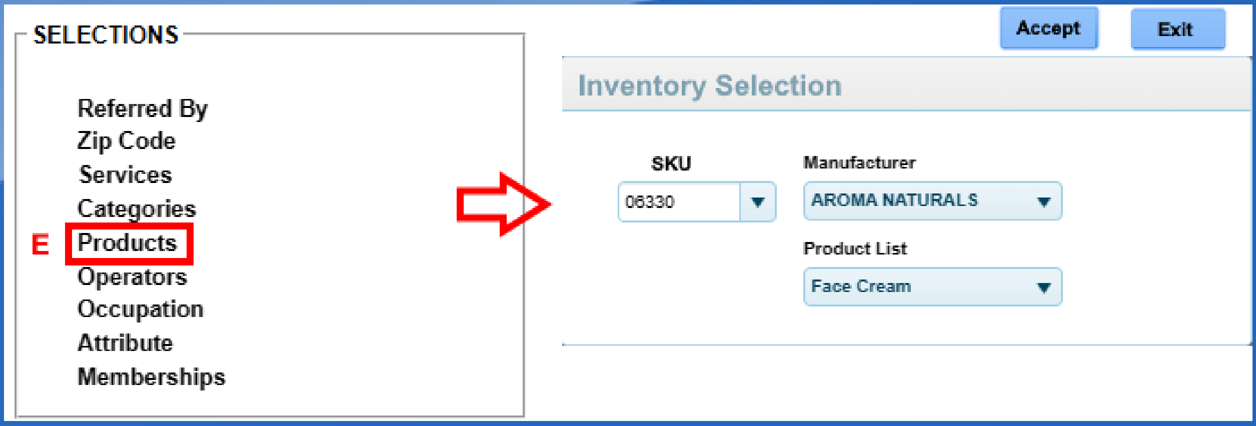
B: **Zip Codes:** Only consist of zip codes that you have entered into the software. If you make more than one selection in this screen, a client can be referred by ANY of the selections highlighted and qualify for this list.



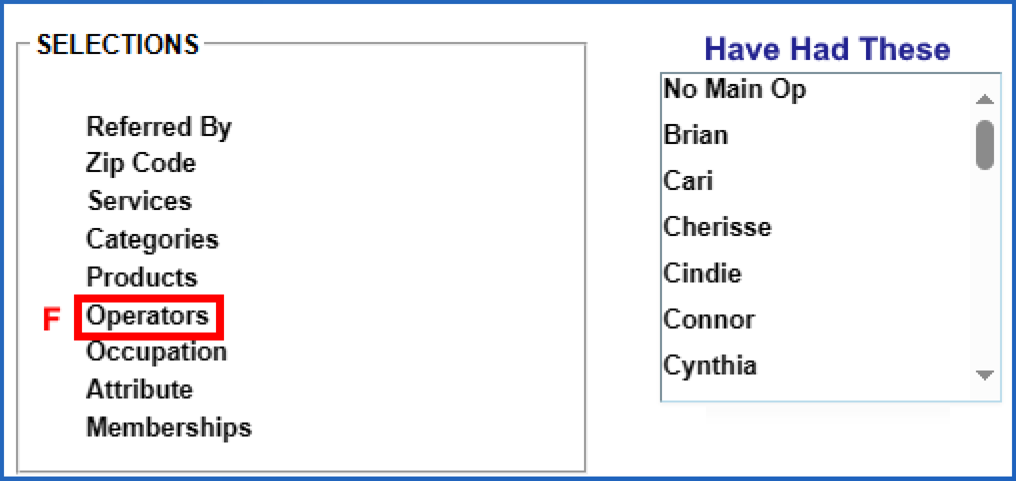
C: **Services:** If you select more than one service under 'Have Had These' then the customer can qualify if they'd had ANY of the highlighted service, not all. This can be used in conjunction with the 'But Not These' header but either can be used as a stand-alone.

D: **Categories:** Qualifies any customer that has purchased a product that is associated to the highlighted category. If more than one selection is made, the client will qualify if they have purchased within ANY of the highlighted categories, not all.

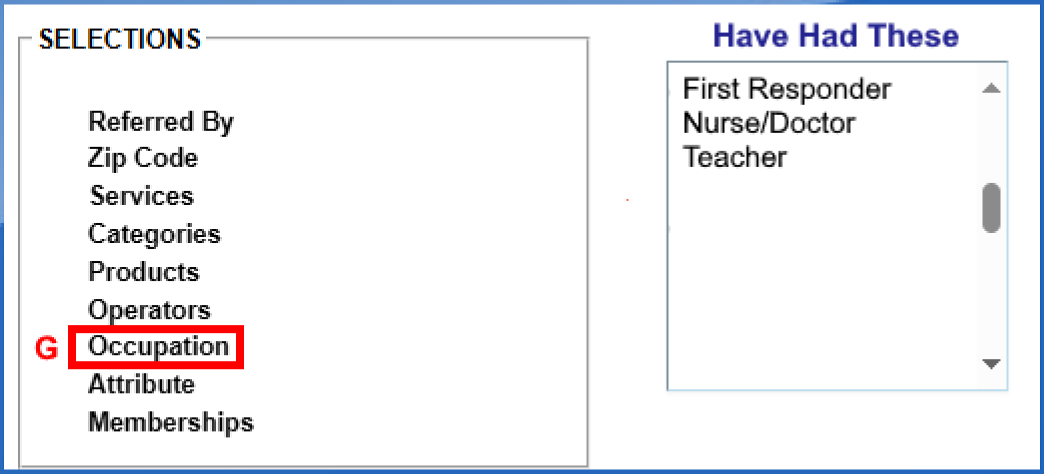
E: **Products:** Type in the SKU number of a product, or use the Manufacturer drop down to get a list of just a specific manufacturer's products. Each time you click 'Accept' the product will be added to the SKU dropdown. Client's will qualify if they've purchased ANY of the products listed in the SKU dropdown.



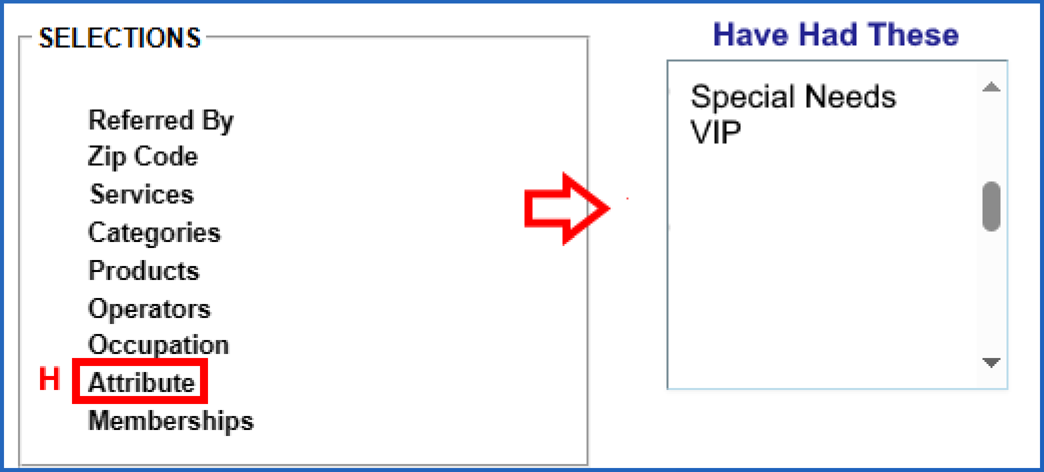
F: **Operators:** Pulls from the 'Main Operator' selection within the client file, not just if they've had services performed by the operator. By selecting 'No Main Op' you'll qualify client's who do not have a selection made in their profile.



G: **Occupation:** Pulls from the client profile and can be modified to suit your individual needs. If more than one selection is made, the client can qualify if they match ANY of the items highlighted.



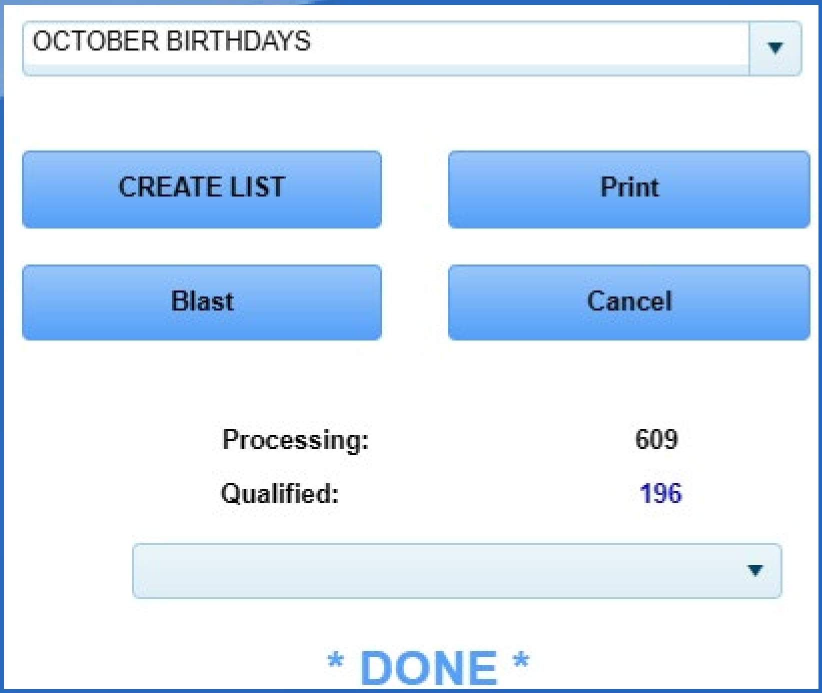
H: Attribute: Configured from the main screen under Setup > Clients > Client Attributes. If more than one selection is made, the client can qualify if they match ANY of the selections.



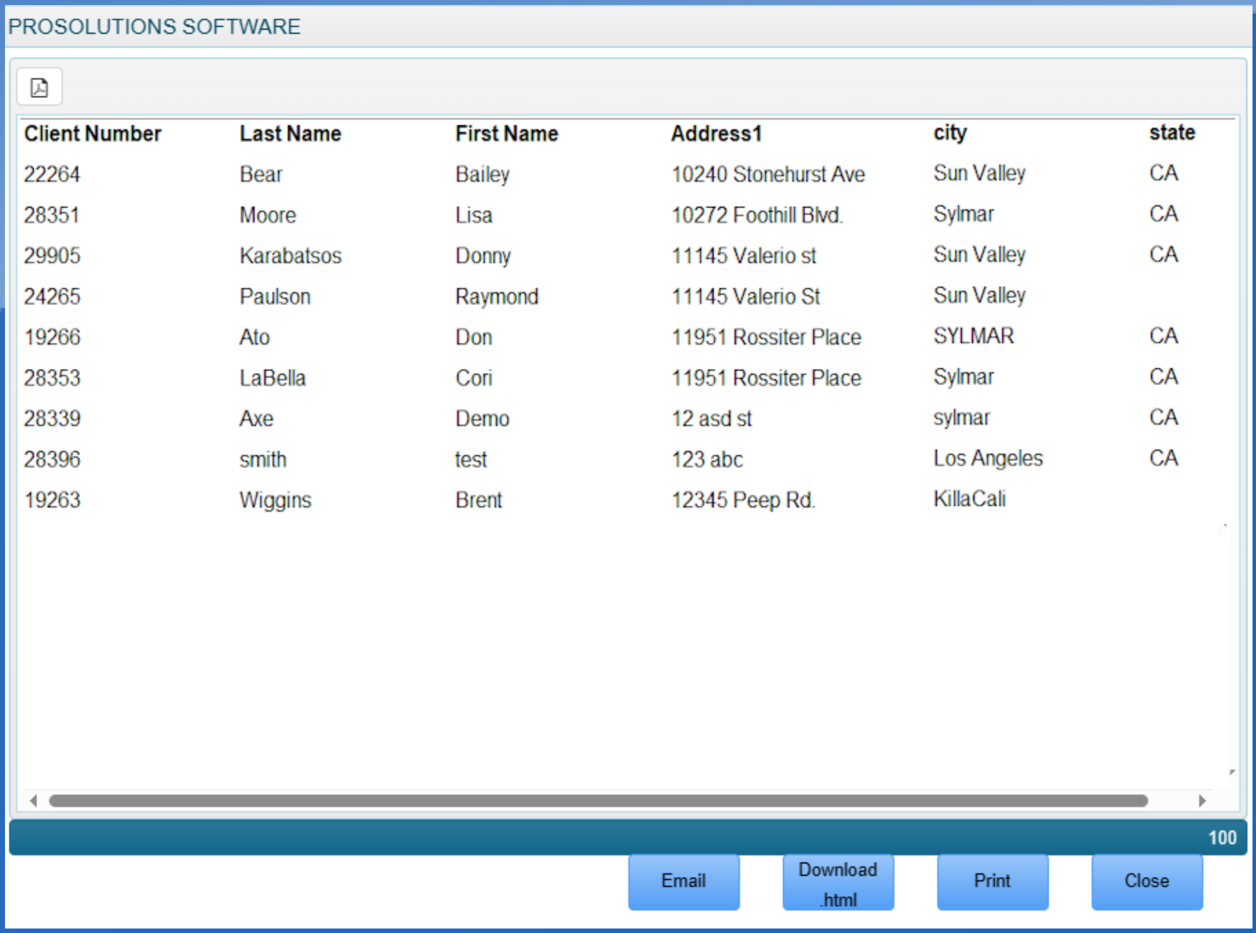
I: **Memberships:** If your business offers Rewards Memberships, those options will appear in this list. If more than one selection is made, the client can qualify if they match ANY of the items highlighted

9. Once you have selected the criteria you would like your client list based upon, give the list a name by typing into the field 'Enter Marketing List Name' and clicking 'Create List.'

10. After this list is created (which can vary in time depending on how many clients you have) you will be presented with the total number of processed clients and the number of clients who qualified for this list. The qualified clients can be viewed individually by using the drop-down list, which will also take you to their client file when you click their name. To print, email, or download this file (which can then be opened in Excel), click the Print button.



11. Select from 3 options below and click 'Close' when done.



Client Number	Last Name	First Name	Address1	city	state
22264	Bear	Bailey	10240 Stonehurst Ave	Sun Valley	CA
28351	Moore	Lisa	10272 Foothill Blvd.	Sylmar	CA
29905	Karabatsos	Donny	11145 Valerio st	Sun Valley	CA
24265	Paulson	Raymond	11145 Valerio St	Sun Valley	
19266	Ato	Don	11951 Rossiter Place	SYLMAR	CA
28353	LaBella	Cori	11951 Rossiter Place	Sylmar	CA
28339	Axe	Demo	12 asd st	sylmar	CA
28396	smith	test	123 abc	Los Angeles	CA
19263	Wiggins	Brent	12345 Peep Rd.	KillaCali	

12. For information on how to use the 'Blast' button within the marketing screen, please view our tutorial on Blast Emails.