

Destwin® Quick Reference Guide
Console Version 2.0
Using Marketing Tools to Manage Customer Site Content
16-JUL-11

This Quick Reference Guide describes how to use the Marketing Tools function in Destwin 2.0 to manage content and messages that will appear to selective groups on the Destwin pages of your web site. In general you must have Administrator permissions to be able to access the Marketing Tools function.

The screenshot shows the Destwin Dealer Manager web application in a Mozilla Firefox browser. The browser's address bar displays the URL <https://newengland.destwin.com/selectors>. The application header includes the Destwin logo and the text "Dealer Manager Web tools for the". Below the header is a navigation bar with buttons for "Admin Functions", "Contract Mgmt", "Risk Mgmt", "Pricing", and "Payments". The "Admin Functions" menu is expanded, showing a list of options: "Advanced Functions", "Categories", "Configurations", "Data", "Set-Up", "Documents", "E-Mail", "Customer Usage", "Account Dashboard", "Content Management", "Loyalty", "Marketing Tools", "Notifications", "Form Wizard", "Help", and "Logout". A yellow callout box with a black border points to the "Marketing Tools" option in the menu. The callout text reads: "To access the Marketing Tools function click on Marketing Tools from the Admin Functions menu." In the background, a table is partially visible with columns for "Criteria", "Matches", and "Types".

Criteria	Matches	Types
dynamic.delivery_type = au		
Any account that does not fa		marketing
All accounts	8022	email marketing
dynamic.System_Efficiency < 80	1	email marketing
dynamic.is_new = 1	0	email marketing
dynamic.System_1_Plan_Type =	1580	email marketing
dynamic.Budget = N	5002	email marketing

Tech Tip

When working with Marketing Tools it is useful to run two separate and distinct browsers, e.g. Firefox and Chrome each logged in to the Admin console with Firefox open to the Account Search page that you want to install your message on to and with Chrome open to the Marketing Tools. After editing and submitting a message in Chrome, go to your Firefox window and refresh the page to see your message, then back to Chrome for additional edits and repeat as necessary. In this way you do not have to leave the Marketing Tools page in Chrome to review your edits. We recommend using Google Chrome for creating and editing marketing messages. As of this writing it seems to provide the fastest performance.

New England Bioheat - Marketing Tools - Mozilla Firefox

File Edit View History Bookmarks Tools Help

destwin.com https://newengland.destwin.com/selectors

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New England Bioheat - Marketing Tools

Destwin™

Dealer Management Console v2
Web tools for the Oil & Propane Indus
Client: New England Bioheat

Admin Functions Contract Mgmt Risk Mgmt Pricing Payments Scheduler

Marketing Tools

Type: All Refresh Data

All
email
marketing

Find: Done

Select marketing from the Type drop down menu and click on the Refresh Data button to update the display.

New England Bioheat - Marketing Tools - Mozilla Firefox

File Edit View History Bookmarks Tools Help

destwin.com https://newengland.destwin.com/selectors

Most Visited ((OTRS Manual DESTWIN Data Excha... ((OTRS :: Login [INT] Sign in Destwin, LLC. CRM Inbox - Outlook Web ... Speedtest.net - The ...

New England Bioheat - Marketing Tools

Destwin™

Dealer Management Console v2
Web tools for the Oil & Propane Indus
Client: New England Bioheat

Admin Functions Contract Mgmt Risk Mgmt Pricing Payments Scheduler

Marketing Tools

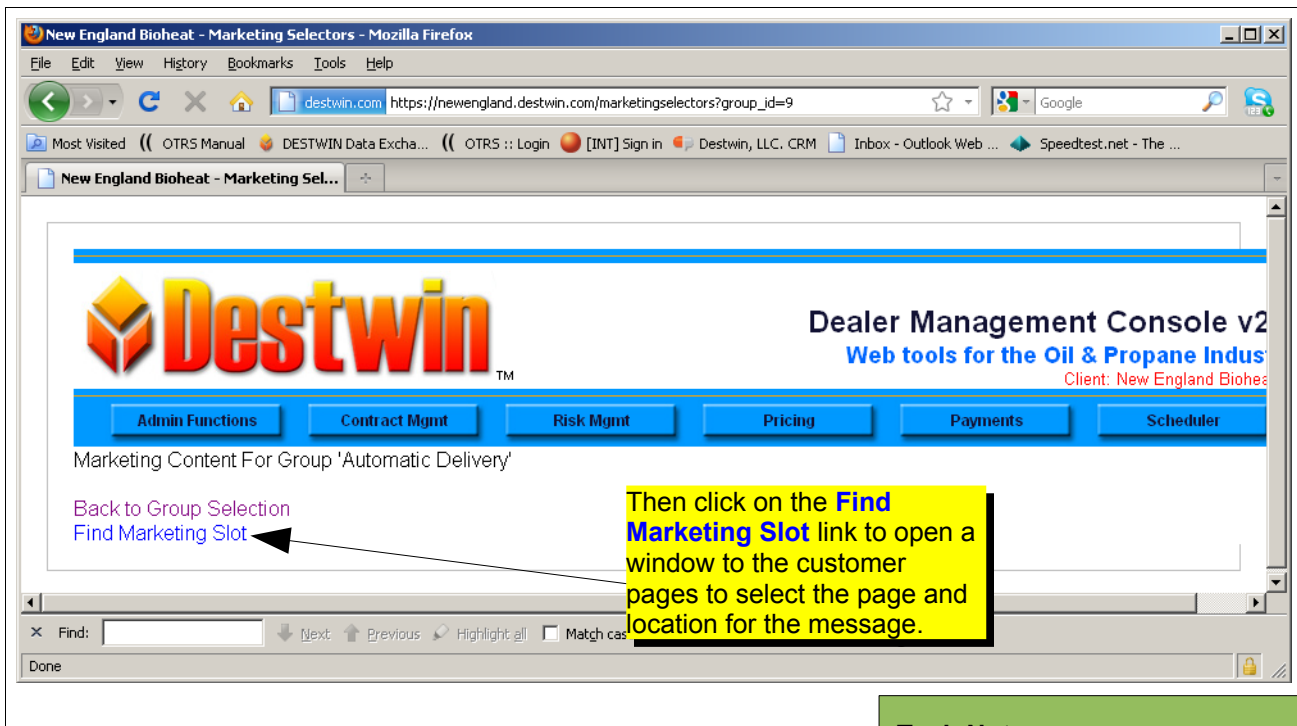
Type: marketing Refresh Data

Choose the group message that you want to set or edit by selecting the **set** link in the Marketing Content column (for example Automatic Delivery Group message).

Name	Criteria	Matches	Exclusive?	Priority	Marketing Content
New Customer	dynamic.is_new = 1	0	0	30	set
Need New Equipment	dynamic.System_Efficiency < 80	1	0	40	set
Past Due Balance	dynamic.balance_45 > 0	1	0	41	set
Will Call	dynamic.delivery_type = will call	2481	0	52	set
Automatic Delivery	dynamic.delivery_type = automatic	5541	0	53	set
Not On Budget	dynamic.Budget = N	5002	0	54	set
No Service Plan	dynamic.System_1_Plan_Type =	1580	0	60	set
Default	Any account that does not fall into another group	0	0	100	set
Everyone	All accounts	8022	0	101	set

Find: Done

Marketing Messages Group Display



Tech Note

Any Marketing Slot that contains 'csr' in its name is a **CSR Only** slot. This means that the message displayed in this slot will only appear to someone who has accessed the site through the CSR Control panel via the Fuel Dealer Admin console. A customer logging in to the site through the public customer login will not see this message. You can use CSR slots to prompt your CSRs to discuss or mention specific topics to a customer group.

New England Bioheat

Home / Logout My Account Info Payments Manage Account

Select This Slot: user_summary_intro

Select This Slot: user_summary_csrscripts

Select This Slot: user_summary_notifications

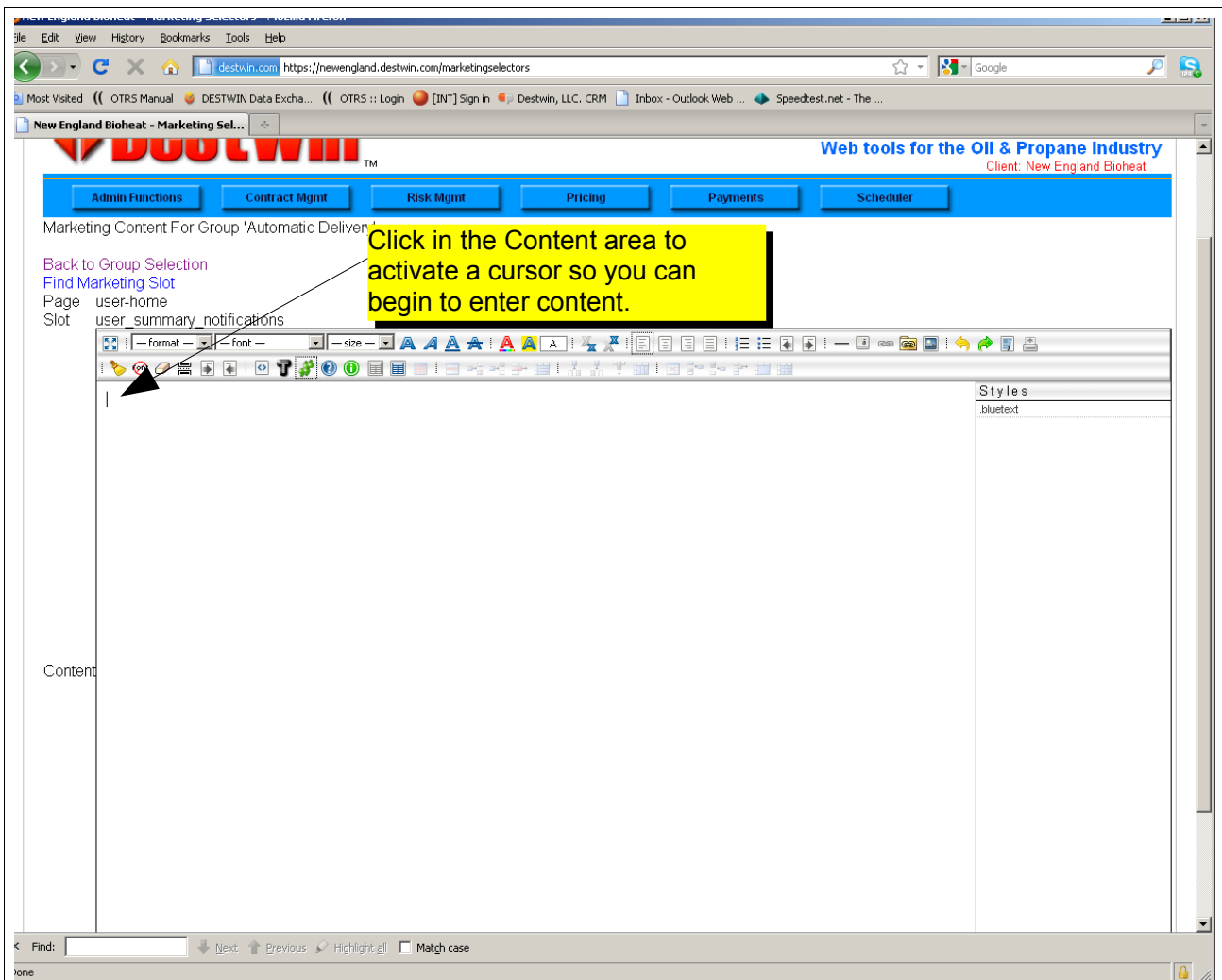
Account Balance	30000
Budget Amount Due	\$586.00
Customer Name	\$0.00
Delivery Address	ELLEN BEETS
Delivery City	47 Ash Terr
Last Delivery Date	WESTON
Last Delivery Gallons	12/09/2008
Last Payment Amount	446.50 gallons
Last Payment Date	\$-294.00
Approximate Annual Usage	01/09/2009
Customer Loyalty Points Earned	1072.00 gallons
Tank Capacity	61,052 Click here to Redeem
Info Last Updated	520.00 gallons
	05/11/2011 04:23:21

Available slots on this page.

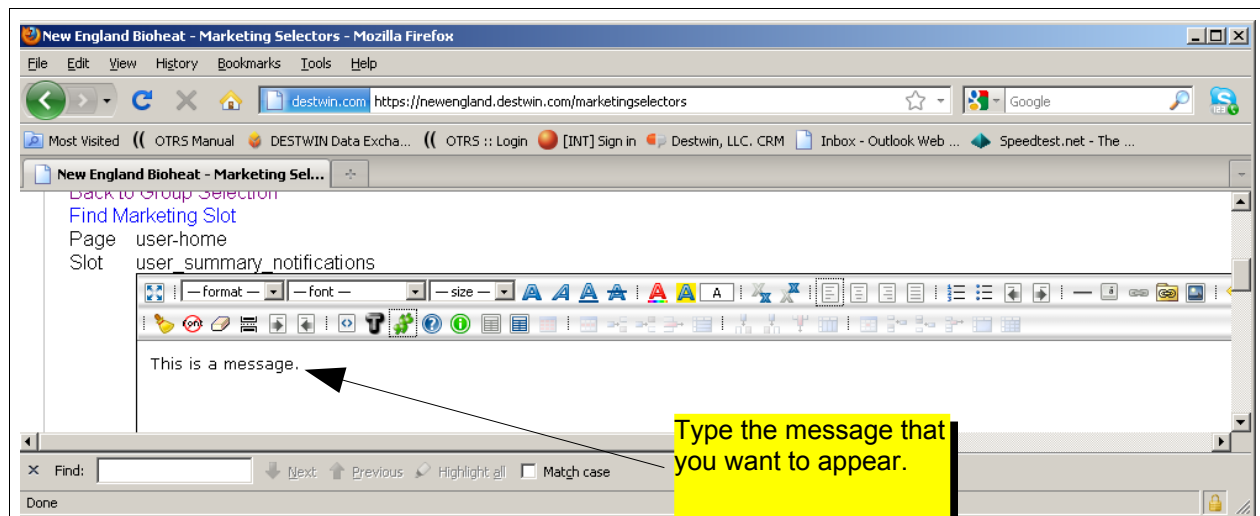
If you want this message on a different page, you can browse through the site to find the specific page and slot.

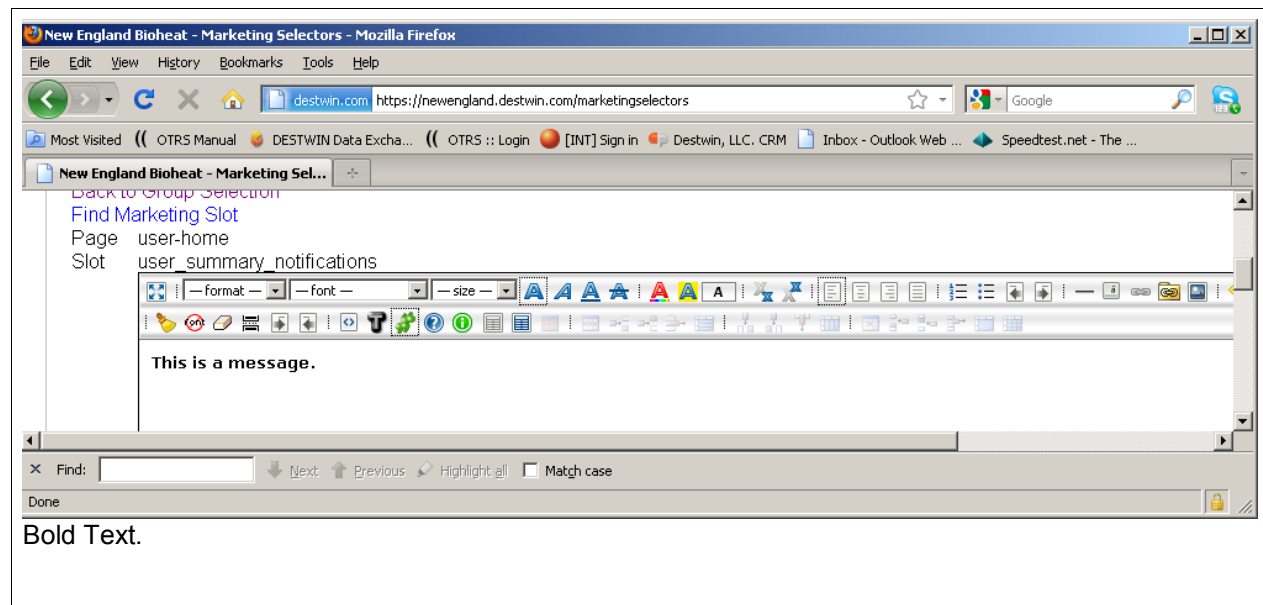
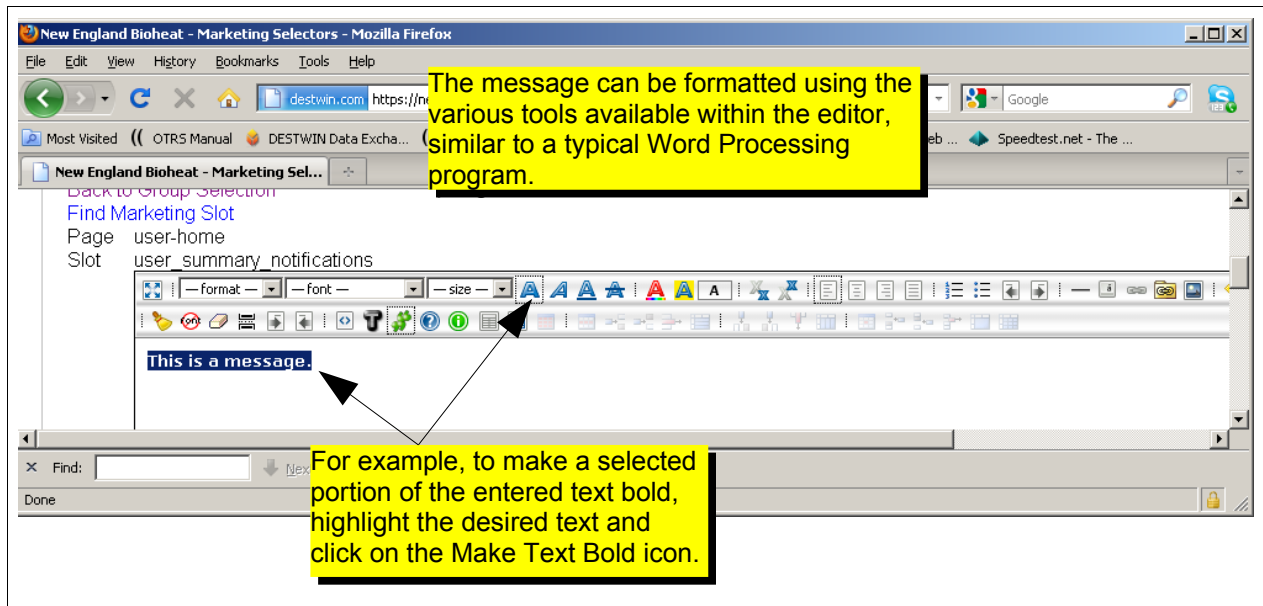
Once you have decided on and located the desired location for your message, click on the Select This Slot link to access the content editor.

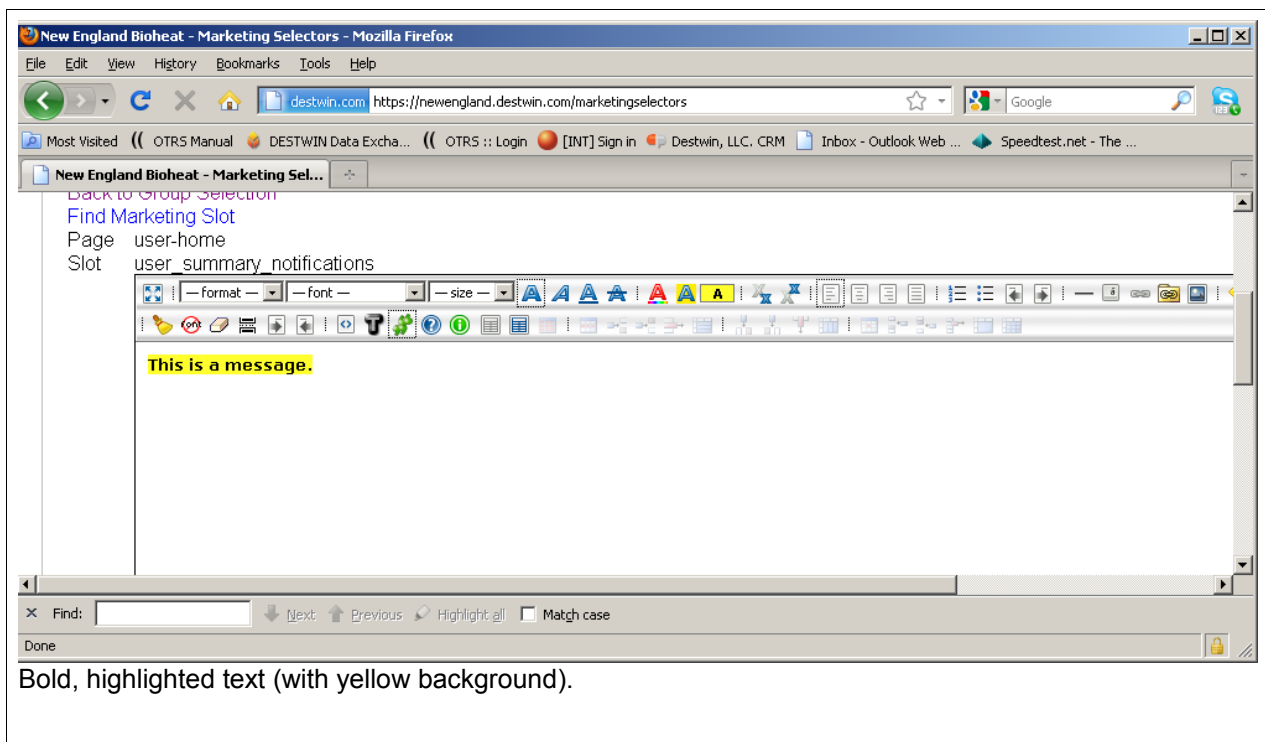
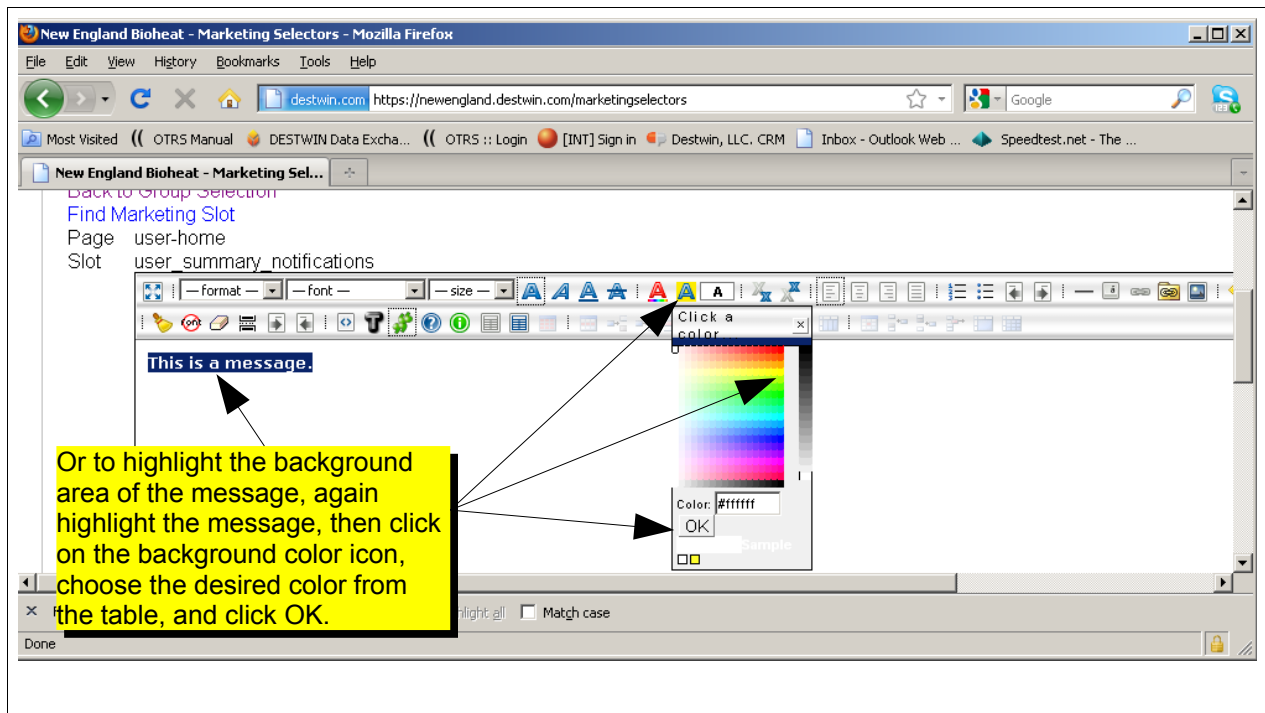
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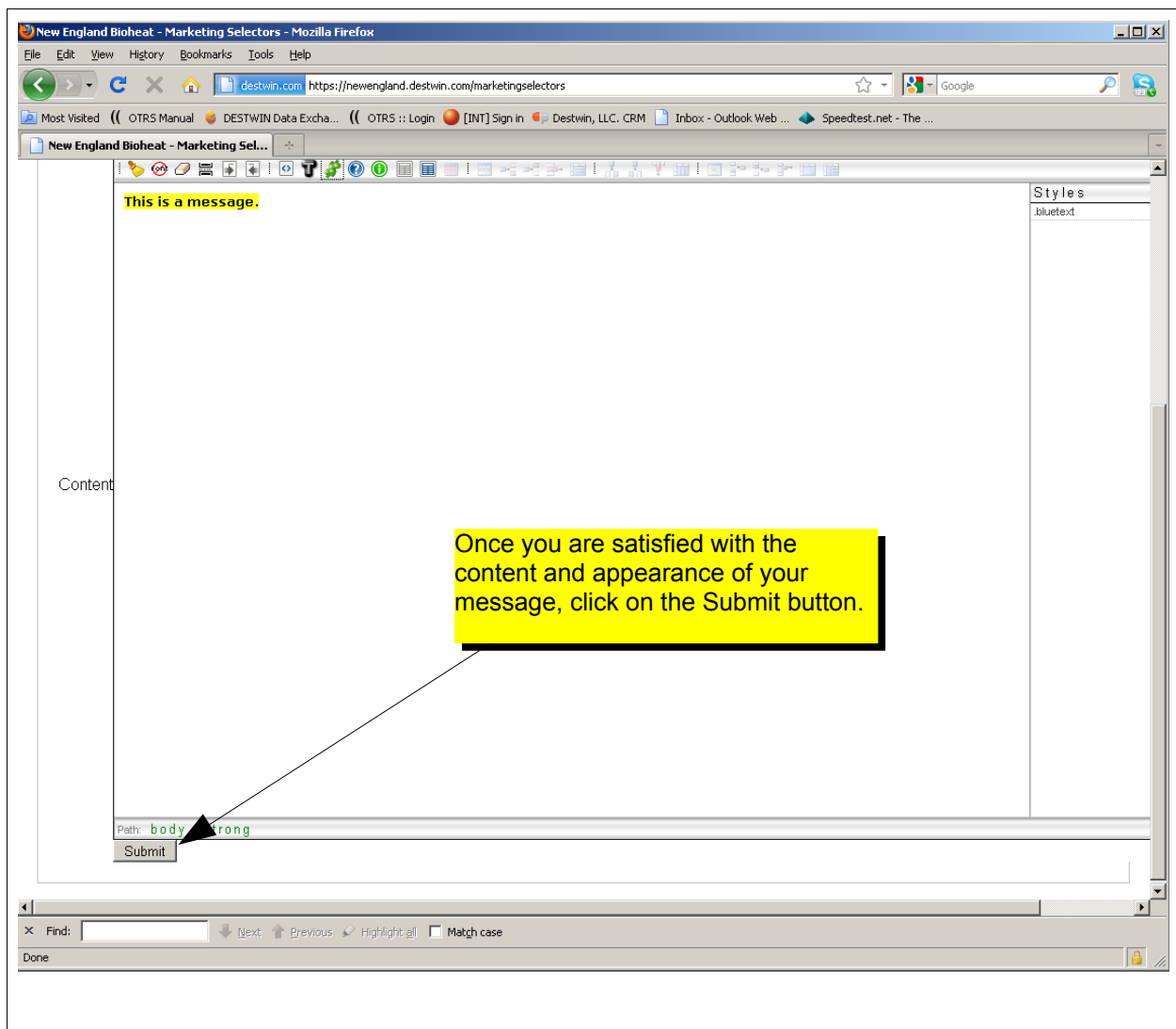


Content Message Editor Tool









Return to your customer screens to see the message in the location you selected.

New England BioHeat

Home / Logout My Account Info Payments Manage Account Plan Enrollment

Select This Slot: user_summary_intro

Select This Slot: user_summary_csrscripts
This is a message.

Select This Slot: user_summary_notifications

Account	30000
Account Balance	\$586.00
Budget Amount Due	\$0.00
Customer Name	ELLEN BEETS
Delivery Address	47 Ash Terr
Delivery City	WESTON
Last Delivery Date	12/09/2008
Last Delivery Gallons	446.50 gallons
Last Payment Amount	\$-294.00
Last Payment Date	01/09/2009
Approximate Annual Usage	1072.00 gallons
Customer Loyalty Points Earned	61,052 Click here to Redeem
Tank Capacity	520.00 gallons
Info Last Updated	05/11/2011 04:23:21

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Find: step Next Previous Highlight all Match case

Done

The message appears above the Select This Slot location that you chose. You can continue to edit the message or return to that same message at a later time by clicking on that same Select This Slot link.

Tech Tip

To delete a message, select the slot as you would if you were going to add or edit it. Once in the editor, delete the entire message and Submit it.