Streamsend Mail Integration
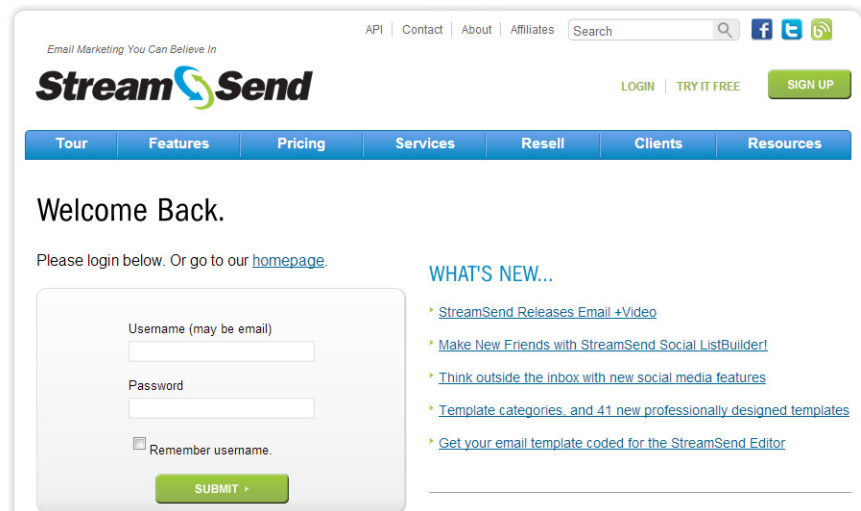
Quick Reference Guide

Opmetrix Version 4.0 onwards

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Introduction

Streamsend (www.streamsend.com) is an online email marketing solution for sending HTML email newsletters & promotions to your customers and prospects.

Opmetrix has direct integration to Streamsend enabling all store contact data collected in Opmetrix to be available in Streamsend.

The result is that you can send professional marketing campaigns to your customer, and apply all of the filters and targeting available in Opmetrix to select and target your audience.

For example - send an email to *"all contacts with the position of Manager in the South Island".*

The Opmetrix contacts system is easy to keep customers up-to-date and linking with Streamsend ensures your marketing base is also current.

Before You Start

Streamsend

There are many email marking and promotional tools available on the web (eg Mail Chimp). We selected Streamsend as it had a good interface for integrating with Opmetrix data.

To use the Streamsend service users must sign up with Streamsend and maintain an active account with them. There are various rates depending on the number of emails you send monthly and services you require.

Email Design

Streamsend offers standard templates that can be used and edited for email design. They also have a template design service which can include your logo, colours and layout for a fixed fee. These services are not provided by Opmetrix.

Running Streamsend

Streamsend is not hard but does require learning to maintain templates, add content and send emails. An administrator with good email skills will be required within your organisation.

Opmetrix Contacts

There are two default fields in contacts that record each contacts Department and Position. These fields can be renamed to suit.

Each field can have a preset list of choices. For example if you use Department the list may be Butchery, Bakery, Deli and the Position might be a choice of Manager, Storeman and owner. By having predefined lists, this makes it easier to uniformly select a group of contacts to email in Streamsend.

The Opmetrix Administrator can maintain these lists in the Admin section of Opmetrix CMS.

Synchronising Contacts

To update Streamsend with the latest contact data, select the "Sync to Streamsend' button from the contacts maintenance screen.

A status dialogue will update you on progress of the synchronisation process. Do not close this window during synchronisation process:

1. **Beginning sync, please wait...** - Sync process has not begun yet and will begin shortly.

2. **Checking Streamsend Credentials**- Streamsend API and Key settings are being checked.

3. **Syncing Opmetrix CMS database with Streamsend** – Opmetrix CMS database columns are being matched with Streamsend fields.

4. **Adding Opmetrix CMS Hierarchy and other selections to Streamsend fields** - The Opmetrix CMS hierarchy, Position and Department data is being matched to Streamsend

5. **Uploading Opmetrix CMS Contacts to Streamsend** - The Opmetrix CMS contacts are being compiled into a file and sent to StreamSend.

6. **Upload complete**, - The upload was received successfully by Streamsend, awaiting a response to determine if the import was successful.

7. **Sync complete** - Synchronization Complete.

Available Fields

The following fields are sent from Opmetrix CMS Contacts to Streamsend

- Email address
- First name
- Last name
- title
- Position (Customizable name)
- Department(Customizable name)
- fax
- phone
- mobile
- notes
- deleted (special flag used by Opmetrix)

In addition each contact is populated with the customer record associated with that contact. These fields are:

- Customer ID
- Customer Name
- Category 1
- Category 2
- Category 3
- Category 4
- Category 5
- Category 6
- Category 7
- Category 8
- Staff Code
- add1
- add2
- add3
- add4
- postcode

By sending all this data to Stremsend, advanced targeting and filters can be defined to better select your target audience.

Important Notes

- Streamsend should not be modified manually when integrated with Opmetrix. For example do not manually add contacts or change field or configuration in Streamsend.

- Streamsend uses the email address as a unique ID, this means that if two contacts have the same email address only one will show in Streamsend (the most recently modified contact)

- All contacts are synchronized through to StreamSend even when a contact has unsubscribed from receiving emails. It is therefore important to **always add a filter** to any email promotion to ensure that deleted customers are excluded. Deleted customers represent unsubscribed contacts.

- If two Synchronizations /updates are simultaneously are run in Opmetrix CMS, wait 10 minutes and run a subsequent import to ensure there were no conflicts on the last import.

Technical Setup

This information is only for an Opmetrix administrator. We recommend you contact Opmetrix support (support@opmetrix.com) before making any changes to these or any Opmetrix system settings.

1. Ensure a valid streamsend account is active

2. Generate an API key from within Streamsend

3. streamsendApiKey - They API key supplied by Streamsend

4. streamsendApiLoginId - The Loginid supplied by Streamsend

5. Complete a synchronisation

6. Review data and fields in Streamsend

7. Send a test email blast and confirm success.