Broadcasts

A **Broadcast** is a message that is sent to multiple customers at the same time, usually for advertising or announcement purposes. These **Broadcasts** can take 3 forms:

- SMS – Short Message Service
    - A simple text message, up to 160 characters, sent to customers with a functional cellular phone number.
- MMS – Multimedia Messaging Service
    - A larger message, up to 1500 characters, that can include images or other files, sent to customers with a functional cellular phone number.
- Email
    - An email message that can include text, images, and other files, sent to customers with an email address on file.

Creating a Broadcast

1. Open the **Broadcasts** screen using the menu on the left side of the screen.
2. Select the blue <u>New Broadcast</u> button in the top left corner of the screen.
    a. The Create Broadcast drawer will open.
3. Enter the *Title*, *Type*, and *Location* for this **Broadcast** then select the <u>Create</u> button.
    a. *Location* is useful if you have multiple dealership locations, and only wish to **Broadcast** to the customers from a single location.
    b. Once a *Type* is selected for a **Broadcast**, it cannot be changed.
4. Next, you will have the opportunity to create the **Broadcast** message. The available entries will vary based on the *Type* of **Broadcast** you are creating, but may include text, emoji, links/URLs, and file/photo attachments.
5. Once your message is complete, you can preview it by selecting the blue <u>Eye</u> button in the top right corner of the screen.
6. You can also use the <u>Test Message</u> button to send a test copy to your phone/email.
7. Make sure to save your changes by selecting the blue <u>Disk</u> button in the top right corner of your screen.
    a. If you are interrupted, you can always save your work, and return to continue later.

Sending a Broadcast

1. When ready to send a **Broadcast**, navigate to the **Broadcasts** screen, and select the tile for the broadcast that you saved through the process above.
2. Select the blue <u>Eye</u> button to preview your message before sending.
3. Select the <u>Right Arrow</u> button to choose the **Customer Group**(s) that should receive this message.
    a. When selecting more than one group, each customer will only receive the **Broadcast** once. By default, a single customer will only receive a **Broadcast** once every 14 days.

4. Once you have chosen the correct group(s), select the Send Now button to transmit your **Broadcast.**
    a. You can also schedule your **Broadcast** to go out at a later date and time.

A **Customer Group** is a live-updating list of your customers, divided using the rules you put in place. **Customer Groups** can be used for sending **Broadcasts** or broadcast loyalty **Surveys**. Your TargetCRM/Notify360 system comes pre-loaded with several useful **Customer Groups**.

Creating a Customer Group

1. Open the **Customer Groups** screen using the menu on the left side of the screen.
2. Select the blue New Customer Group button in the top left corner of the screen.
    a. The New **Customer Group** screen will open.
3. Enter a memorable *Name* and *Description* for your new customer group.
4. The default *Filters* include Service customers from the last 6 months. Use the + Add Filters button to customize your *Filters* from among the following:
    a. *Location*: Which of your dealership locations should you pull customers from?
    b. *Invoice Type*: Service customers, Parts customers, Equipment customers, or all?
    c. *Invoice Time Frame*: *Duration*
        i. *From Month:* How many months do you want to go back from the current month?
        ii. *Period Month:* How many months before the *From Month* should you go back?
            1. Example: *From Month*: 6 and *Period Month*: 6 will show records from 6-12 months ago.
            2. Remember that this time period is always based on the current date.

    OR

    d. *Invoice Time Frame: Range*
        i. *From/To:* Enter a specific date range for your time frame.
        ii. These date fields will never change automatically, make sure to update them before using your customer group!
    e. *Select Product Line(s)*: Which product lines do you want your customers to have?
    f. *Select Customer Category*: Which kinds of customers do you want to Broadcast to?
    g. *Select State*: Which states (or provinces) do you want your customers to be from?
    h. *Zip Code*: Which zip (or postal) codes do you want your customers to have and address in?
    i. *Distance from location(s) in miles*: How far do you want the customer to be from your dealership(s)?
        i. *1 mile* = 1.6 kilometers.
    j. *Cross Sell Time Frame*: This allows you to find customer records who haven't made a certain purchase type in a timeframe.
        i. *Cross Sell*: Which sale type are you looking for? No Part Sale, No WG (WholeGood) Sale, or No Service?
        ii. *Duration*:
        iii. *Time Period*: How many months since their last *Cross Sell* sale type?
            1. Example: *Cross Sell*: "No Part Sale in months" and *Time Period*: 6 will show all customers who haven't bought from parts in 6 months.

iv. *Range:*
v. *From/To:* Enter a specific date range for your cross sell timeframe.
vi. These date fields will never change automatically, make sure to update them before using your customer group!

k. *Phone Number*: Do you want your broadcast to go only to a single phone number?
    i. This can be helpful for creating a test group where all Broadcasts go only to your phone, so you can test before sending to a large Customer Group.
l. *Part/Model Number (Comma Separated)*: Are you looking only for customers who purchased specific parts/models?
    i. This can be helpful for recalls or specials regarding specific equipment, just make sure to enter commas between each number!
m. *Customer Tag*: Are you looking for customers who have a specific tag in their profile?
n. *Minimum Spent*: Do you want only customers who have spent enough money with the dealership?

5. After saving your *Filters*, the total count of customers in the group will display, as well as a list.
    a. You can specify whether you are looking to broadcast *By Cell Phone* or *By Email.*
    b. The Download CSV/EXCEL button allows you to download the list of customers as a spreadsheet.
6. Select the Create button to finish creating your **Customer Group**.