# ProMarket Instructions

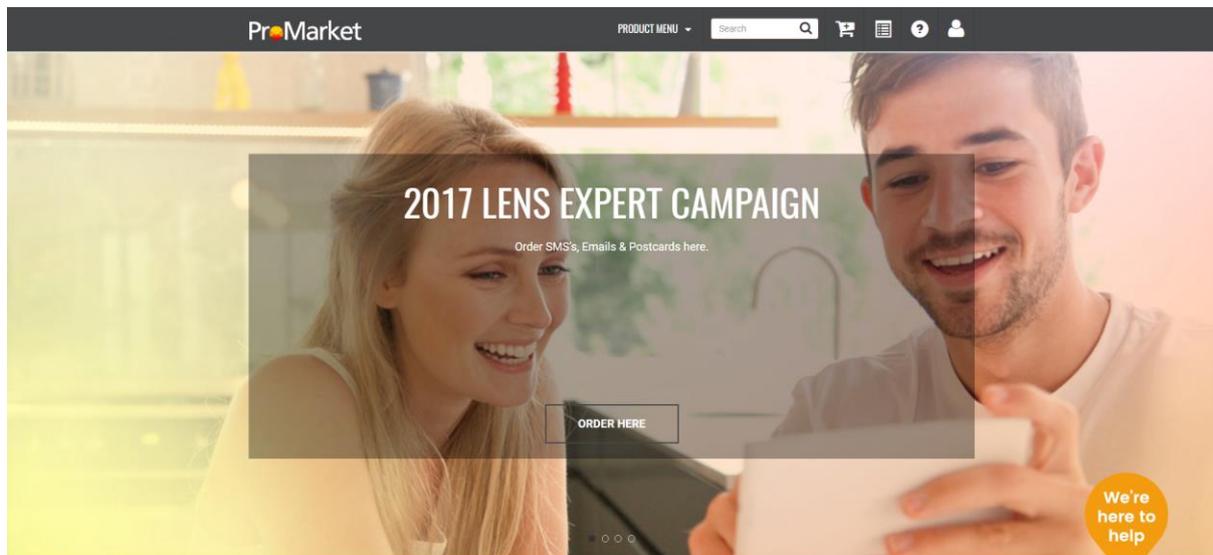**Logging in, Placing an Order and Reordering**

ProMarket is ProVision's cost-effective local area marketing website, which allows you to incorporate your brand automatically across hundreds of designed templates for immediate and centralised distribution to your customers.

These instructions will take you through ordering direct mail and marketing elements from ProMarket, including;
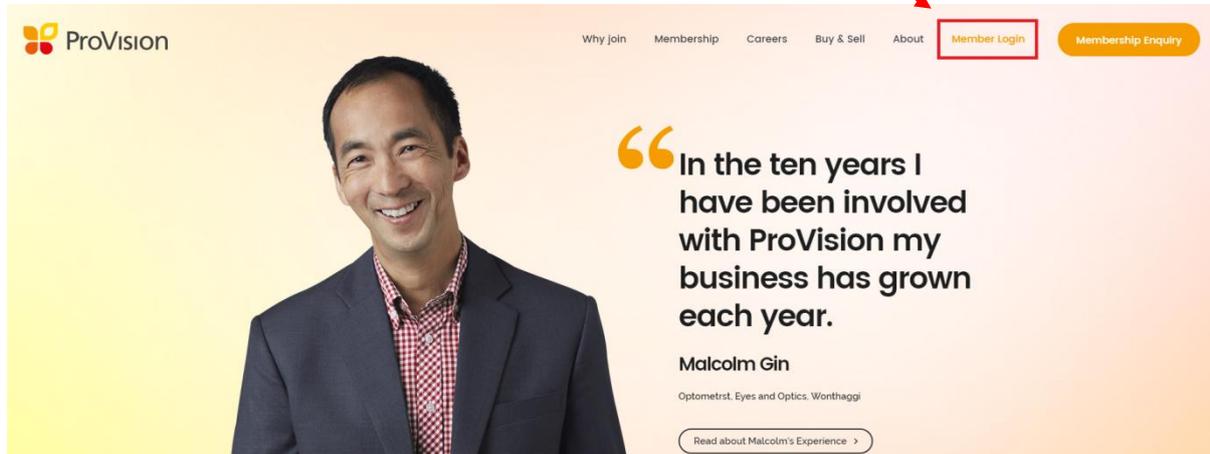
**Logging in and Navigating ProMarket………………………………………………………………..Page 2 - 6**

**Step 1.** Open your browser and head to https://optom.provision.com.au/
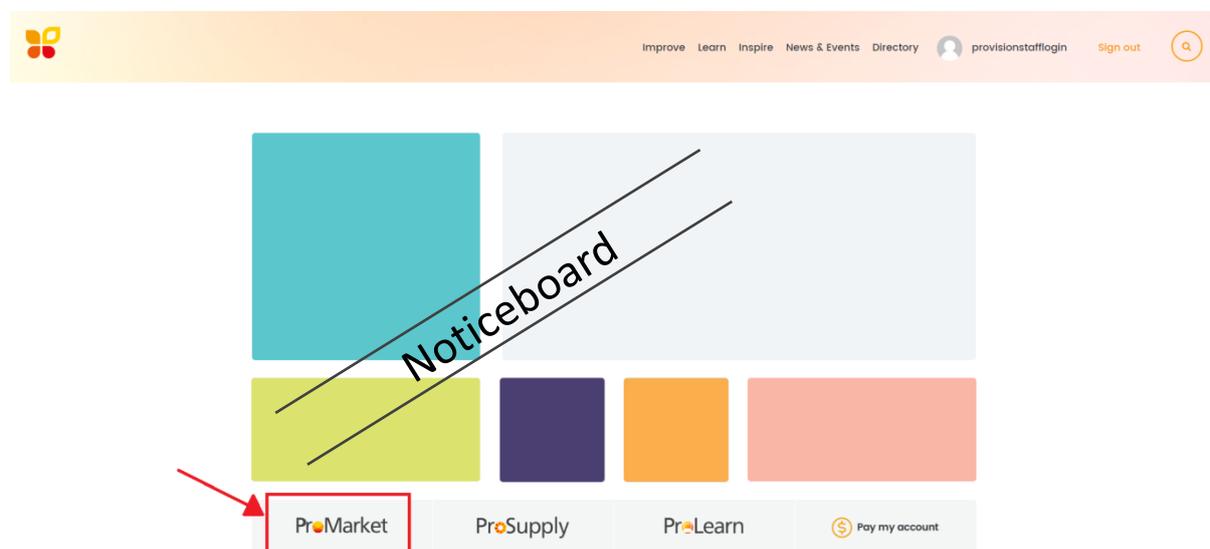
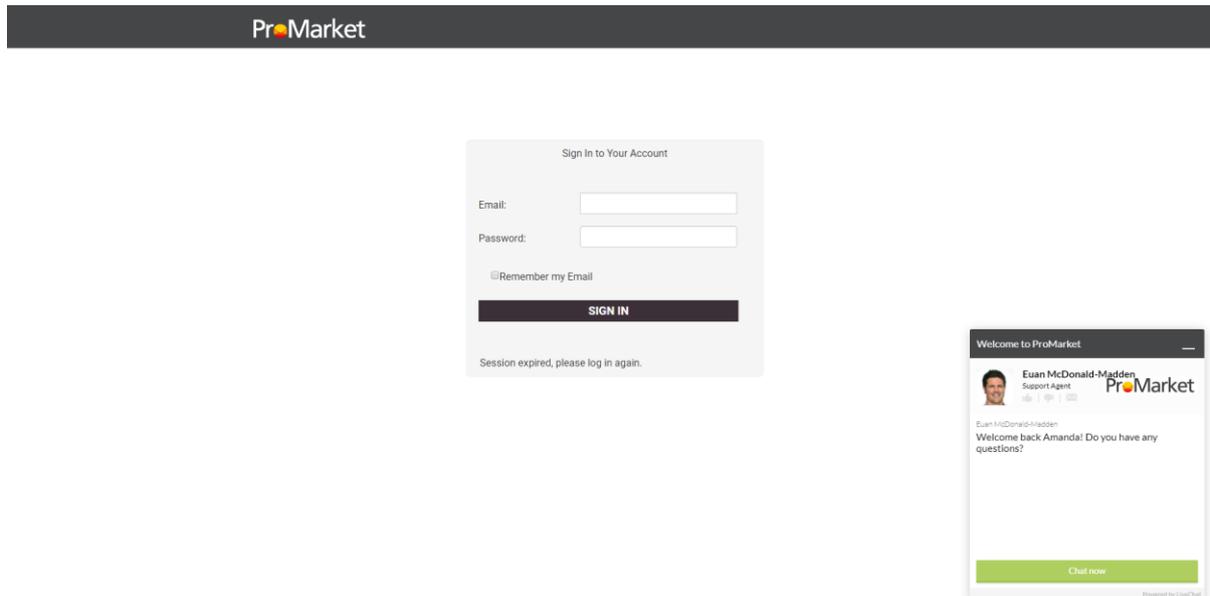**Step 2.** Click on Member Login, to log into the secure member website



**Step 3.** Enter your username and password
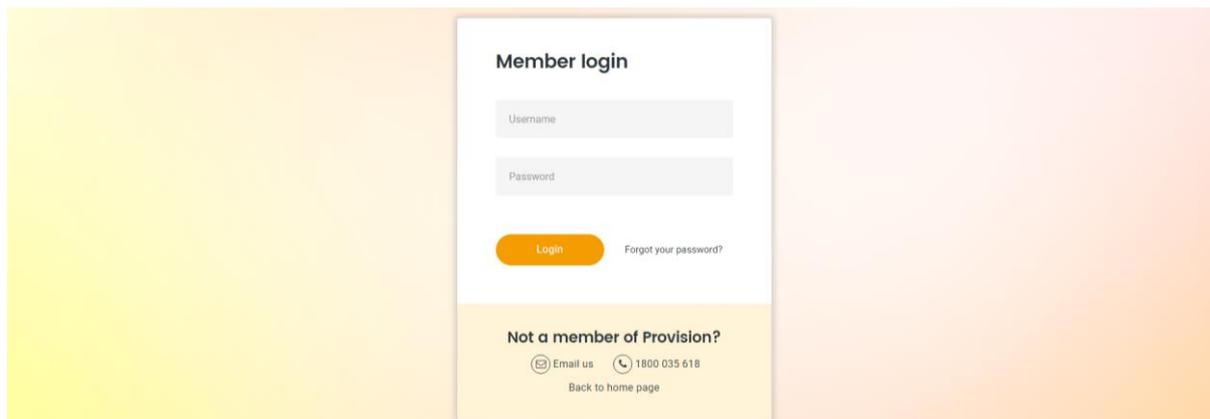


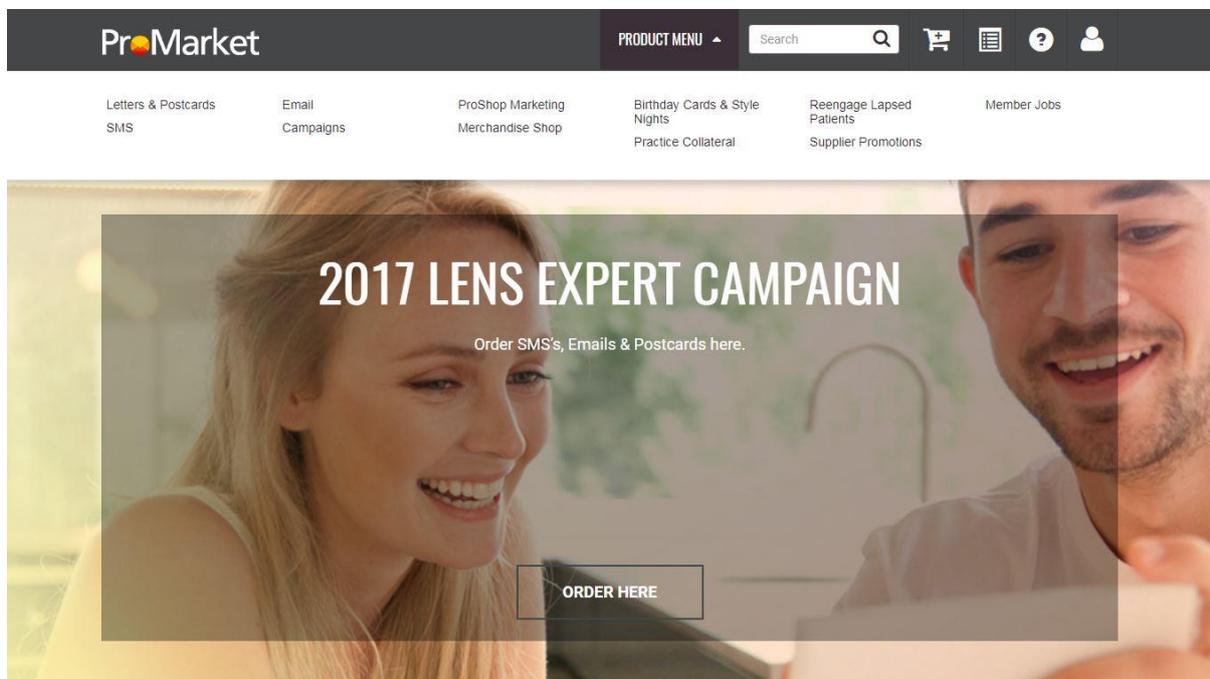**Step 4.** Click 'ProMarket' underneath the noticeboard

**Step 5.** Use your ProMarket username and password to log in and start browsing ProMarket products and templates



TIP: If you can't remember your password or need any help along the way use live chat in the bottom right hand corner and we can help you with your query.

**Navigating ProMarket**



 The product menu is your gateway to all templates available on ProMarket. Select from Letters & Postcards, SMS, Email, Campaign etc. to find the product you are after.

**Breakdown of the Product Menu**



**Letter & Postcards** – a range of recall letters and postcards both, pre filled with suggested text and free text options to write your own recall message. There are also free text postcards and letters available to you with a variety of images to choose from, allowing you to write your own message and call to action for a direct mail campaign.

TIP: Once you click into the product you will find between 6 – 9 image variations in majority of postcard templates

**SMS** – a range of SMS templates including recall with suggested text, prescription sunglasses and lapsed patients. The most used product on ProMarket are our free text SMS templates ranging from 160 – 320 characters and the option to personalise your SMS with Dear <patient name>.

**Email** – Free text emails with over 90 image options, facebook promotional email templates, as well as Net Promoter Score emails for you to choose from.

TIP: Once you click into the product you will find between 5 – 15 image variations in majority of email templates

**Campaigns** – ProVision provide a range of products for each quarterly marketing campaign. You will have access to any combination of letters, postcards, emails, SMSs and brochures communicating the current campaign message.

**ProShop Marketing** – Postcard, flyer and email templates to help you promote your new ProShop e-commerce website.

**Merchandise Shop** – a range of generic practice merchandise such as, shopping bags, lens sprays, cleaning kits, stickers, presentation trays and more.

**Birthday Cards & Style Nights** -  birthday card templates to send to patients on their birthday or to celebrate 1 year of owning their new glasses.

**Practice Collateral** – pull your logo into a range of brochures, folders, banners, gift vouchers, signage, warranty glasses care leaflets and welcome to the practice forms.

**Reengage Lapsed Patients** – Postcard, email and SMS templates focused on reengaging your lapsed patients in your database.

**Supplier Promotions** – ProVision Supplier Partner templates, including; Sunshades, Maui Jim, Eyes Right Optical, Alcon and Essilor.

**Member Jobs** – We are able to design a custom template for your practice and upload it as a product for your future use. This is where you will have exclusive view of your dedicated product.
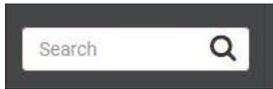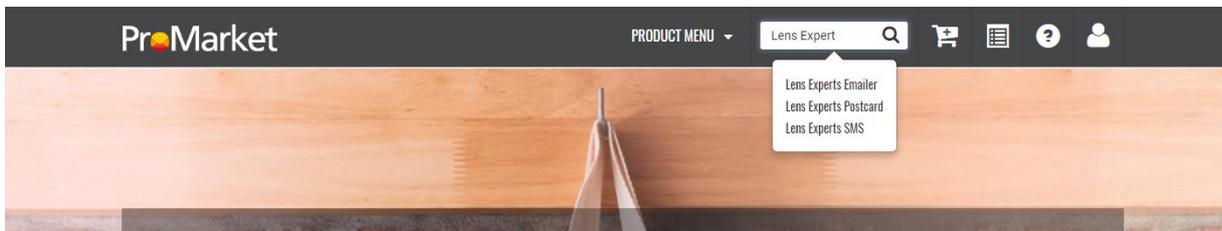
 **Search Bar**

ProMarket has a powerful search bar that will help you find the product you are after. Simply type in a key word of what you are looking for and the results will populate underneath the bar itself, no need to click enter!

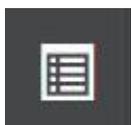For example, if I search for free text SMS:
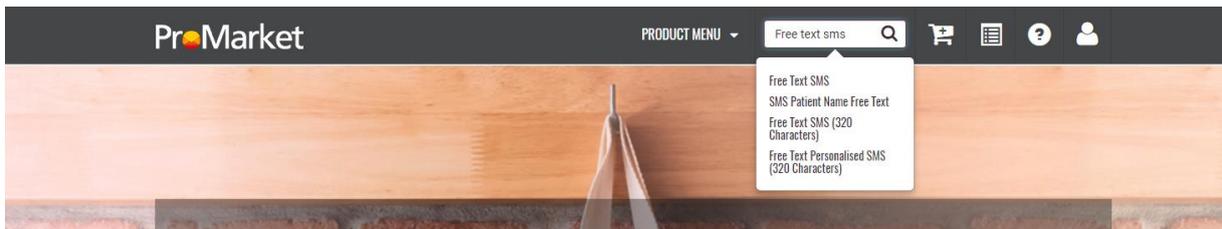


Or maybe you are looking for campaign materials, type in Lens Expert:



 **Your Shopping Cart**

Just like any online shopping your shopping cart will hold all products ready for order. Once you have completed filling your cart with all your required products, follow the prompts to check out.

 **Your Draft Orders**

Started creating a product but didn't quite finish? You will find your drafts here. Simply hit the continue arrow to finish creating your product and add it to your shopping cart, otherwise you can delete it from the list if you were not happy with your creation.

TIP: your draft orders will only save your last 3 drafts, if you would like to save a draft for the next little while, simply hit save and you will ensure it always appears in your 'Saved Draft Orders' until you decide you no longer require it and click delete.



## Help Section

Find a selection of different documents to help you navigate and use ProMarket. Instructions include, exporting data from SUNIX or Optomate, navigating ProMarket, ordering a product etc.

## Your Account

Gives you access to your Order History, Addresses, Data Lists and Head Office Administration Board. The main area of interest will be your Order History. You are provided a list of all your past orders so that you can review what was sent, print out your invoices to compare with your ProVision statement and re-order products previously ordered.

| Order# | Order Date | Total Amount |
|--------|-----------|--------------|
| 308885 | 31/05/2017 | $30.29 |
| 858045 | 01/03/2017 | $30.11 |
| 451935 | 09/01/2017 | $0.75 |
| 581635 | 09/01/2017 | $0.75 |

ProMarket works by pulling in your practice details and logos into a template.

**What details can you add to your ProMarket profile?**

- Practice Name
- Phone Number
- Practice Address
- Email Address: Recommended to have a professional consumer facing email address, as opposed to a personal email address.
- Practice Logo

Optional items that can be used on certain recall letter templates

- Optometrist Headshots
- Optometrist Signature
- Optometrist Qualifications
- Practice Image
- Map image of Practice Location
- Booking Appointments Online Icon
- Shop Online Icon
- Health Fund Logos
- ECP Logos
- Social Media Logos

**How to update your practice information on ProMarket?**

All practice information is updated by ProVision. Unfortunately you are not able to adjust your practice information yourself when logged into ProMarket.

If you would like to change or add any information to your ProMarket profile simply email these updates to marketing@provision.com.au.

Note: Updates take a few hours to complete once submitted to DMM (the company behind ProMarket). We strive to have all details updated and ready for use the morning after your request is sent through.

**Ordering a Postcard…………………………………………………………….……………...Page 8 – 11**

When sending a postcard you will be asked to upload a data list of your patients' details. This is so your patient information can be merged into your postcard design and sent directly to your patient's doorstep. We recommend having your list ready to go before starting to build your product.

**Step 1. Prepare your datalist**

Think about who you would like to target and export a datalist from SUNIX or Optomate. If you are unsure how to do this, go to our help section in ProMarket and see 'Mailing list instructions SUNIX / Optomate' for help, alternatively you can call SUNIX or Optomate's helpline.

Now that you have your list from SUNIX or Optomate we need to clean up your data. ProMarket requires the following information in the format below for a postcard datalist:



Remember to remove any duplicates to ensure patients receive only one postcard. If you are not confident at using excel, please call the marketing team to take you through this editing process, 03 8544 3900.

TIP: Add your practice details, this way you will receive the postcard when your patients do.

**Step 2. Using either the search bar or through navigating the product menu find the postcard you would like to order.**

For this example we will use a Free Text Postcard.



Click continue to get started

## Step 3. Select your image

Note: Each product is slightly different, for this example we are taking you through the content in the Free Text Postcard template.

Select the image you would like to show on the cover of your postcard. This particular product has 8 images to choose from.
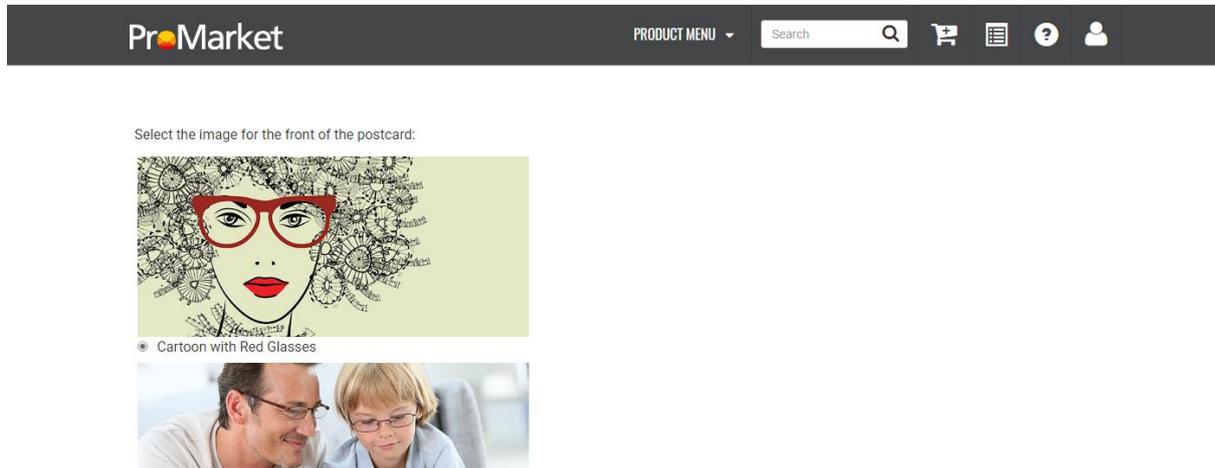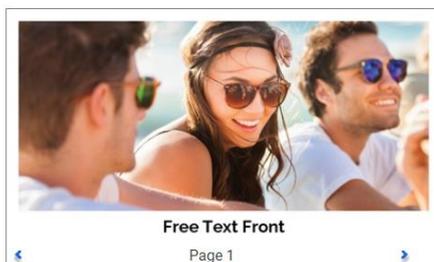


Once selected, click next



## Step 4. Enter your postcard text

Type in your call to action message for the front cover, your postcard body text, your heading and any terms and conditions, if relevant.

TIP: it is best to type your text directly into the text box on ProMarket, copying and pasting can sometimes take unwanted code from the original program over into the text box on ProMarket.

## Step 5. Select your practice details

From the dropdown select your practice name. If relevant, add in your practice website and facebook URL.
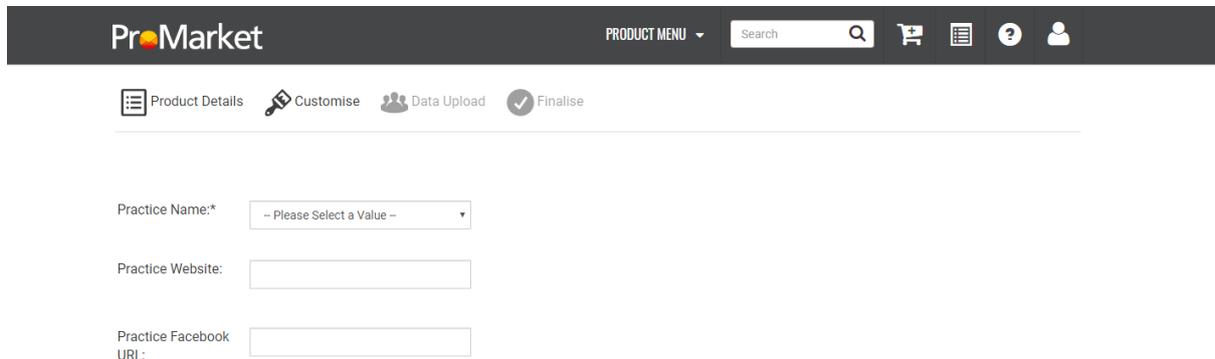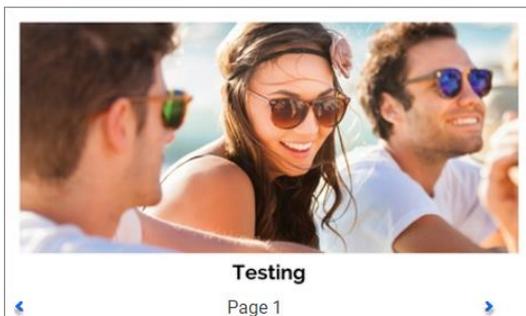


TIP: if you would like to see how your product is looking, at the bottom of each page you have the option to 'Refresh Preview':



## Step 6. Upload your datalist created in Step 1

Simply click on 'Choose File', select the file of choice and click Open



Once you have selected your file, click Next

**Step 7. Confirm your list**

You will now see a full list of all patients in your datalist. Check to see everything looks correct. Once you are happy click Next



**Step 8. Confirm your order**

This final page will show you all your order information including; delivery type, number of postcards you are ordering, total cost of your order and also a final proof.



Click the Proof button to view your order, using the little arrows in the top right hand corner to see the front and back of your postcard. Ensure you check;

- Your text for spelling errors
- Your practice details
- Your patients details and address

Once you are happy, tick Proof is approved and ADD TO CART (remember to complete your order you need to continue to check-out the items in your shopping cart)

**Ordering a Letter………………………………………………………………………………..Page 12 – 16**

When sending a letter you will be asked to upload a data list of your patients' details. This is so your patient information can be merged into your letter template and sent directly to your patient's doorstep. We recommend having your list ready to go before starting to build your product.

**Step 1. Prepare your datalist**

Think about who you would like to target and export a datalist from SUNIX or Optomate. If you are unsure how to do this, go to our help section in ProMarket and see 'Mailing list instructions SUNIX / Optomate' for help, alternatively you can call SUNIX or Optomate's helpline.

Now that you have your list from SUNIX or Optomate we need to clean up your data. ProMarket requires the following information in the format below for a letter datalist (For this example we are using our recall letter template):



Remember to remove any duplicates to ensure patients receive only one letter. If you are not confident at using excel, please call the marketing team to take you through this editing process, 03 8544 3900.

TIP: Add your practice details, this way you will receive the letter when your patients do.

**Step 2. Using either the search bar or through navigating the product menu find the letter you would like to order.**

For this example we are using a Recall Letter template.
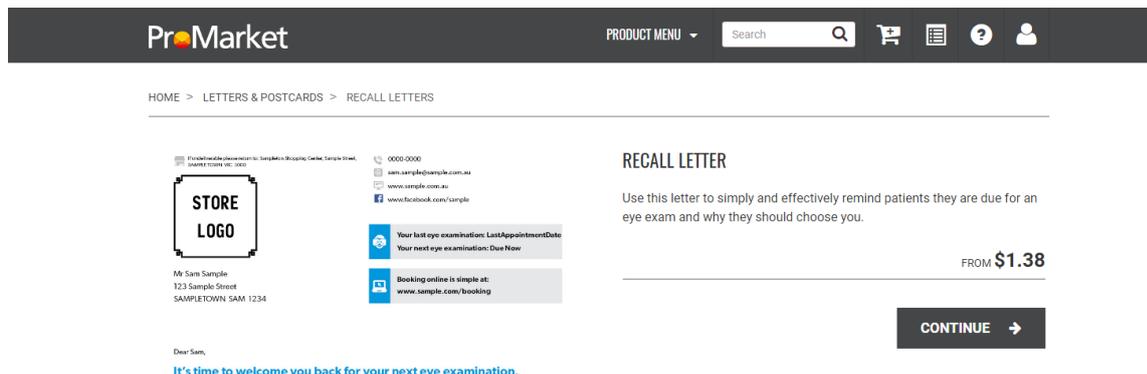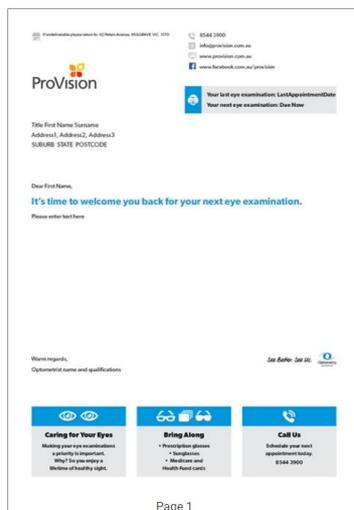


Click continue to get started

**Step 3. Select your practice details**

Note: Each product is slightly different, for this example we are taking you through the content in the Recall Letter template.

From the dropdown select your practice name. If relevant, add in your practice website, facebook URL and Online booking URL.



TIP: if you would like to see how your product is looking, at the bottom of each page you have the option to 'Refresh Preview':



**Step 4. Design your letter**

Select your desired heading from the dropdown options:

Next, select the colour of your letter. This particular product has 20 colours to choose from.

Letter Colour:*

| | | | |
|---|---|---|---|
| ○ Aqua Blue | ○ Storm Grey | ○ Mint Green | ○ Purple Gem |
| ○ Burnt Red | ◉ Burnt Orange | ○ Bright Red | ○ Citrus Green |
| ○ Green Leaf | ○ Orange Juice | ○ Dark Sea Blue | ○ Deep Sea Blue |
| ○ Dove Grey | ○ Brilliant Blue | ○ Deep Orange | ○ Emerald Green |
| ○ Grape Juice | ○ Yellow Sun | ○ Heritage | ○ Grey Sky |

Finally choose to include the See Better. See Us. and/or Optometry Australia logo.
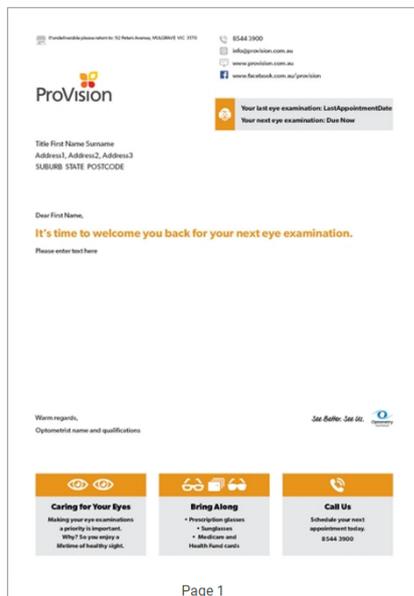
Include See Better See Us Logo?*

-- Please Select a Value --
> -- Please Select a Value --
> Yes
> No

Include Opt Aust Logo?*

Once selected, click refresh preview to view your letter design and click next



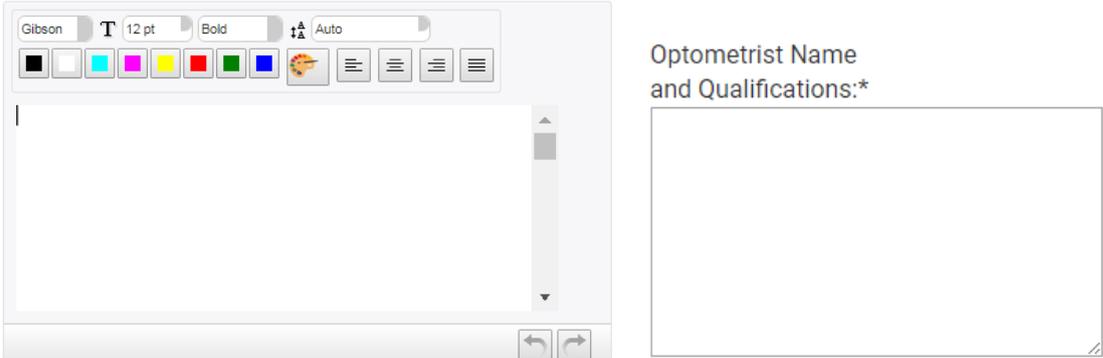Page 1

REFRESH PREVIEW

*Indicates a required field

BACK

NEXT

**Step 5. Enter your letter text**

Type in your text for the body of your letter and also add in your optometrist name and qualifications. (Use the font, size and colour options to make your letter your own).
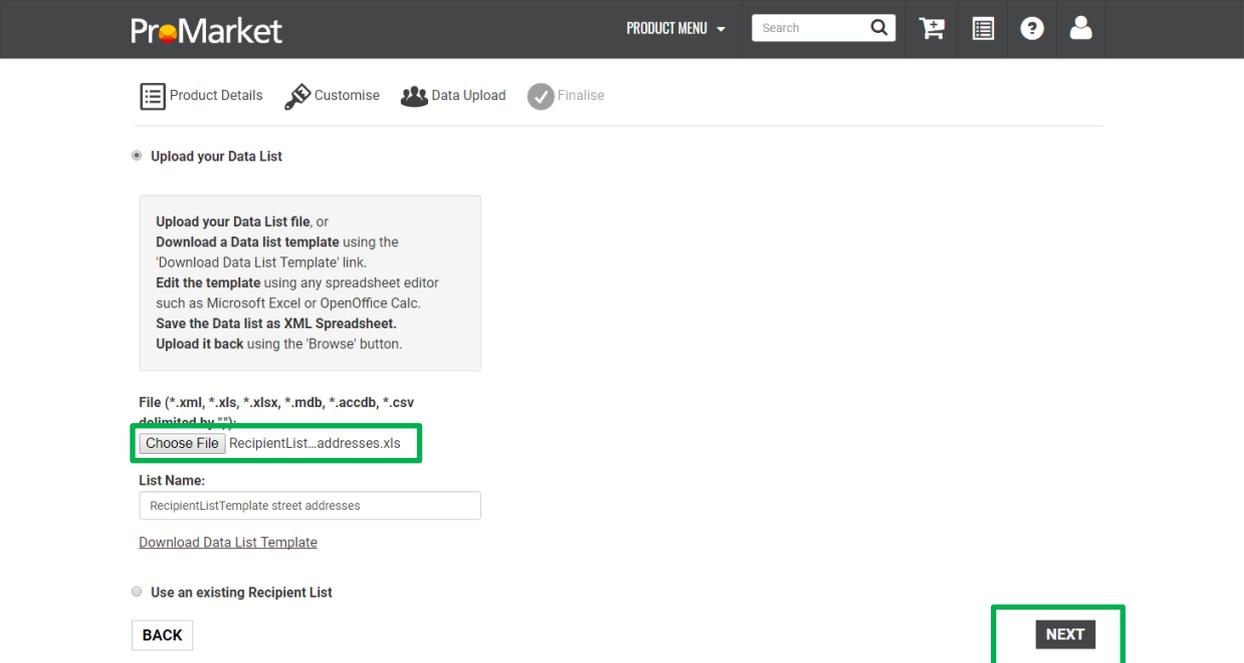
TIP: it is best to type your text directly into the text box on ProMarket, copying and pasting can sometimes take unwanted code from the original program over into the text box on ProMarket.



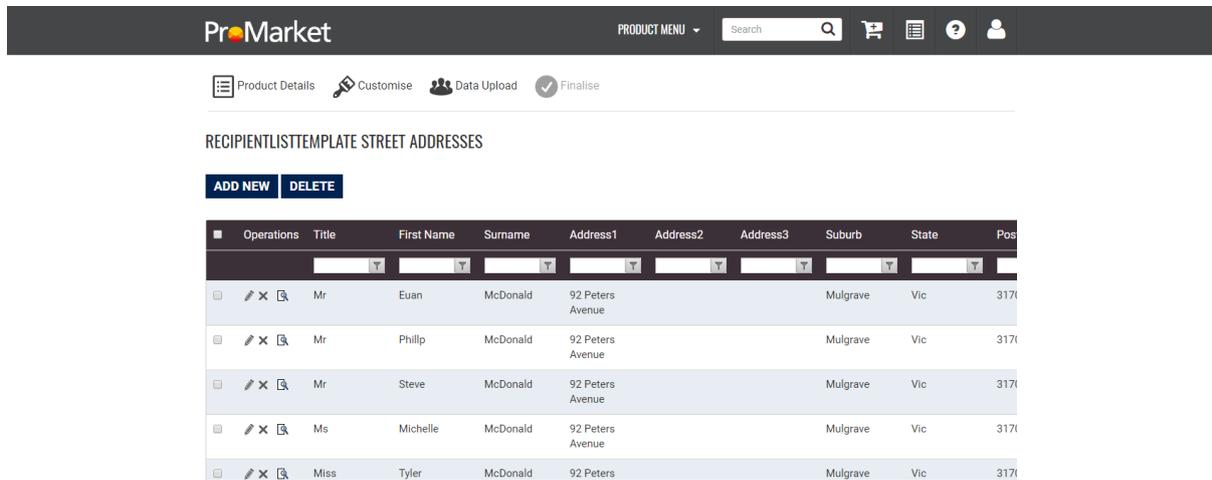**Step 6. Upload your datalist created in Step 1**

Simply click on 'Choose File', select the file of choice and click Open



Once you have selected your file, click Next

## Step 7. Confirm your list

You will now see a full list of all patients in your datalist. Check to see everything looks correct. Once you are happy click Next
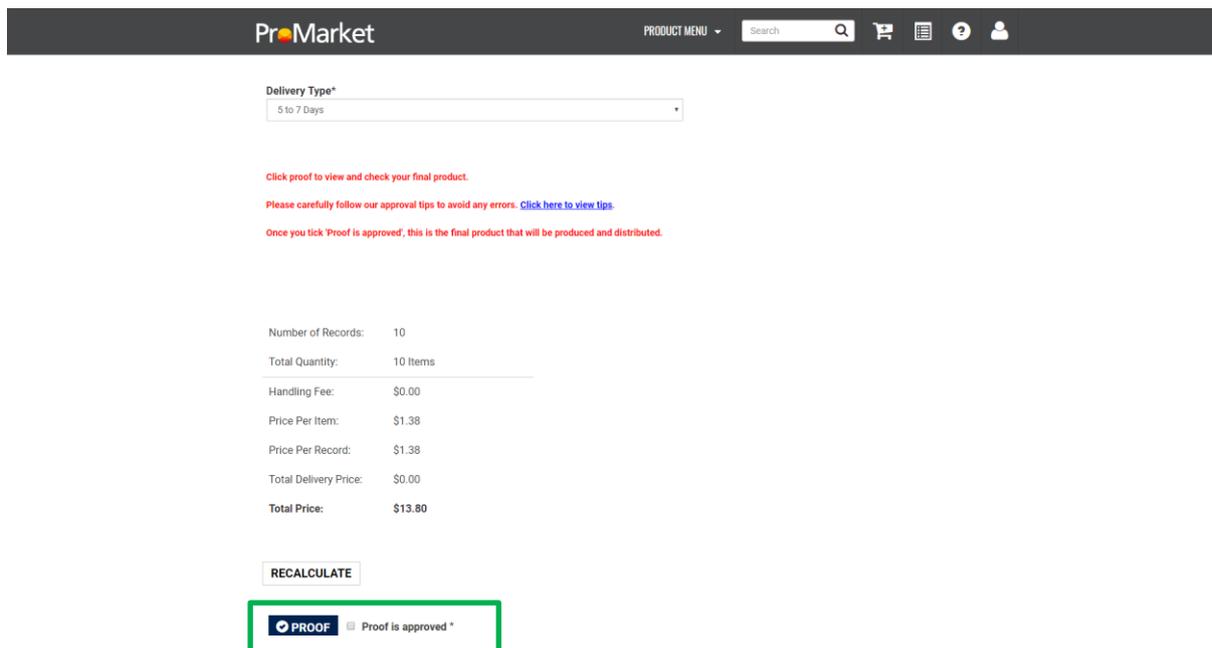


## Step 8. Confirm your order

This final page will show you all your order information including; delivery type, number of letters you are ordering, total cost of your order and also a final proof.



Click the Proof button to view your order, using the little arrows in the top right hand corner to scroll through the different patient details. Ensure you check;

- Your text for spelling errors
- Your practice details
- Your patients details, including 'Your last eye examination' field and address

Once you are happy, tick Proof is approved and ADD TO CART (remember to complete your order you need to continue to check-out the items in your shopping cart)

When sending an email you will be asked to upload a data list of your patients' details. This is to provide ProMarket with your patients' email addresses and names to send a personalised email directly to your patient. We recommend having your list ready to go before starting to build your product.

**Step 1. Prepare your datalist**

Think about who you would like to target and export a datalist from SUNIX or Optomate. If you are unsure how to do this, go to our help section in ProMarket and see 'Mailing list instructions SUNIX / Optomate' for help, alternatively you can call SUNIX or Optomate's helpline.

Now that you have your list from SUNIX or Optomate we need to clean up your data. ProMarket requires the following information in the format below for an email datalist (For this example we are using our Free Text Emails template):
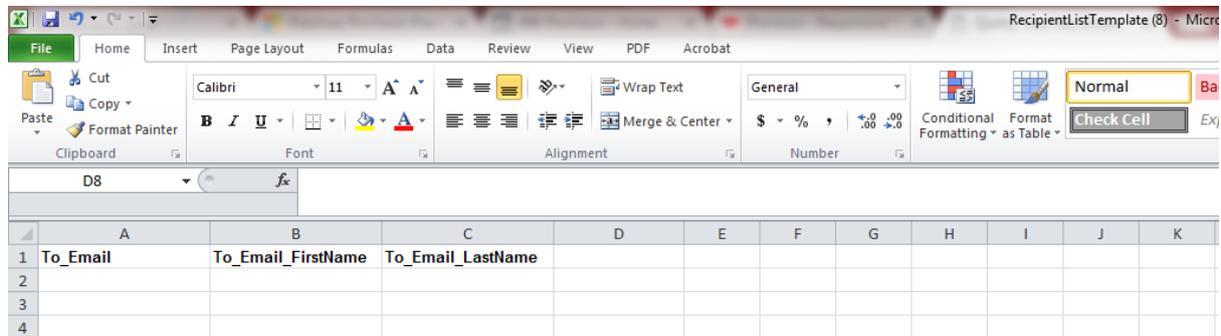


To_Email – provide the patients email address
To_Email_FirstName – provide the patients first name
To_Email_LastName – provide the patients last name

Remember to remove any duplicates to ensure patients receive only one email. If you are not confident at using excel, please call the marketing team to help you edit your list, 03 8544 3900.

TIP: Add your practice email address, this way you will receive the email when your patients do.

**Step 2. Using either the search bar or through navigating the product menu find the email you would like to use.** For this example we are using a Free Text Email template.
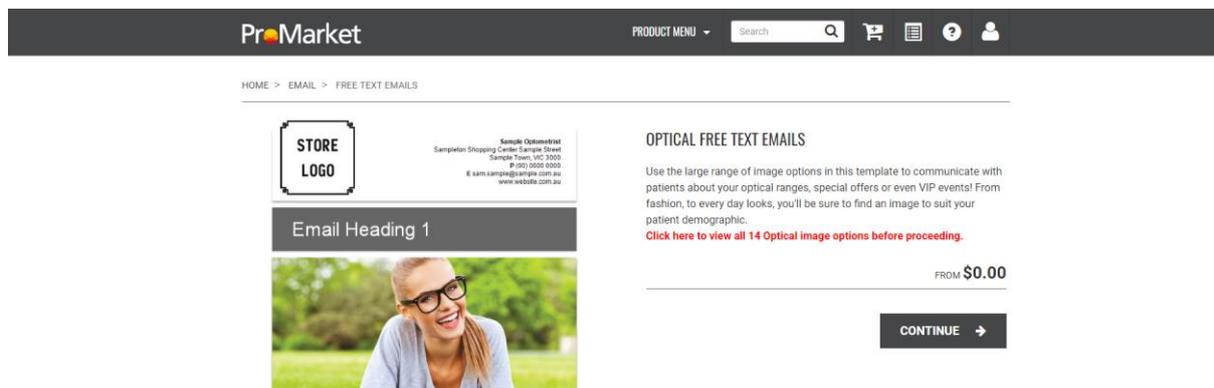


Click continue to get started

**Step 3. Select your practice details**

Note: Each product is slightly different, for this example we are taking you through the content in the Optical Free Text Email template.

From the dropdown select your practice name and type in your email subject. If relevant, add in your practice website.



**Step 4. Select your image**

Select the image you would like to show on the top of your email. This particular product has 14 images to choose from.



NOTE: unfortunately, there is no way to see your email design until the end of the process

**Step 5. Enter your email text**

Type in your email headings and the text for the body of your email. There is also the option to include terms and conditions, if relevant.

TIP: it is best to type your text directly into the text box on ProMarket, copying and pasting can sometimes take unwanted code from the original program over into the text box on ProMarket.



**Step 6. Upload your datalist created in Step 1**

Simply click on 'Choose File', select the file of choice and click Open.



Once you have selected your file, click Next

## Step 7. Confirm your list

You will now see a full list of all patients in your datalist. Check to see everything looks correct. Once you are happy click Next



## Step 8. Schedule your email send time

You have the ability to schedule the time and date in which your email will send out to your patients. Simply select the date and time using the Calendar and Clock icons:

**Step 9. Send yourself an email proof**

Checking your email design through ProMarket involves sending yourself an email proof.  Type your email address into the relevant field and click 'Send Email Proof'



TIP: if you do not receive an email within a minute or so, check your junk mail folder. Please note, if your email proof is in the junk mail folder this does not mean your final product will end up in your patient's junk mail folder.

Ensure you check;

- Your subject line of the email
- Your text for spelling errors
- Your practice details

Once you are happy, tick 'Proof is approved' and ADD TO CART (remember to complete your order you need to continue to check-out the items in your shopping cart)

When sending an SMS you will be asked to upload a data list of your patients' details. This is to provide ProMarket with your patients' mobile numbers and names to send a direct communication to your patient. We recommend having your list ready to go before starting to build your product.

**Step 1. Prepare your datalist**

Think about who you would like to target and export a datalist from SUNIX or Optomate. If you are unsure how to do this, go to our help section in ProMarket and see 'Mailing list instructions SUNIX / Optomate' for help, alternatively you can call SUNIX or Optomate's helpline.

Now that you have your list from SUNIX or Optomate we need to clean up your data. ProMarket requires the following information in the format below for an SMS datalist (For this example we are using our Free Text Personalised SMS (320 Characters) template):
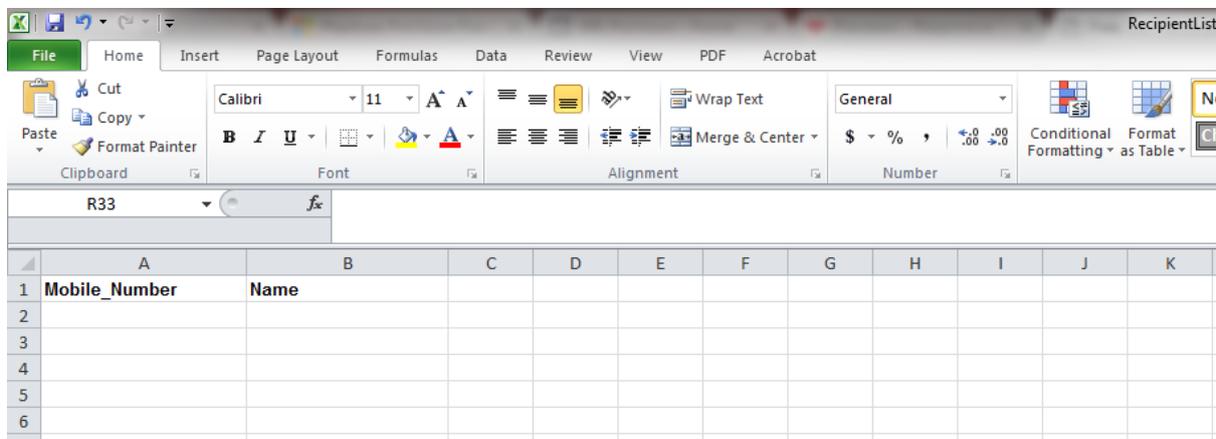


Mobile_Number – ProMarket will accept a mobile number without the 0 at the front (for example 411 111 111), it will not, however, accept a mobile number with dashes (for example 0411-111-111)

Remember to remove any duplicates to ensure patients receive only one SMS. If you are not confident at using excel, please call the marketing team to help you edit your list, 03 8544 3900.

TIP: Add a staff member's mobile number, this way you will receive the SMS when your patients do.

**Step 2. Using either the search bar or through navigating the product menu find the SMS you would like to use.** For this example we are using the Free Text Personalised SMS (320 Characters).
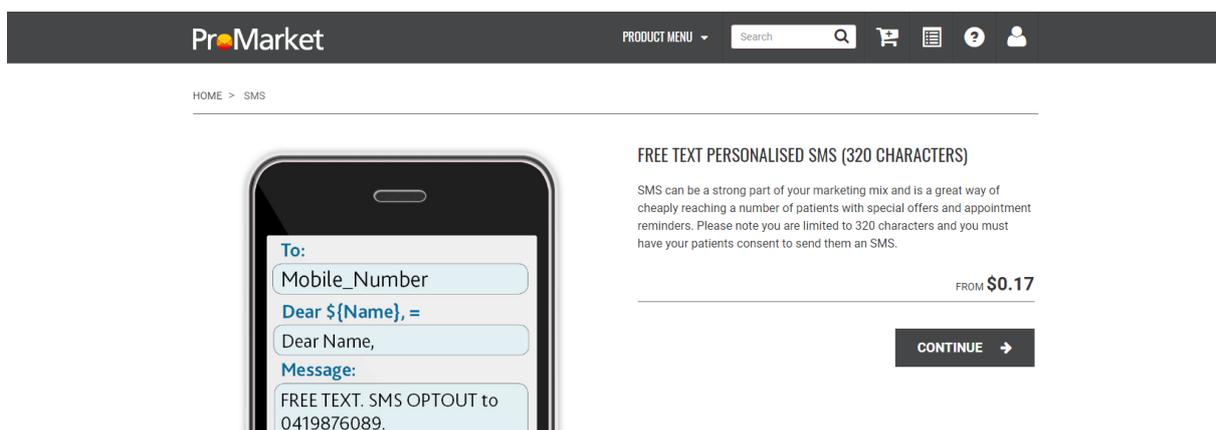
**Step 3. Build your SMS**

Note: Each product is slightly different, for this example we are taking you through the content in the Free Text Personalised SMS (320 Characters).
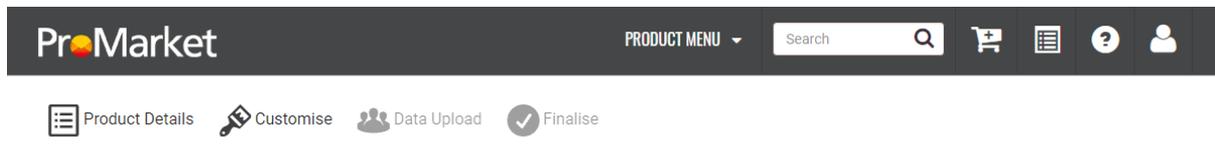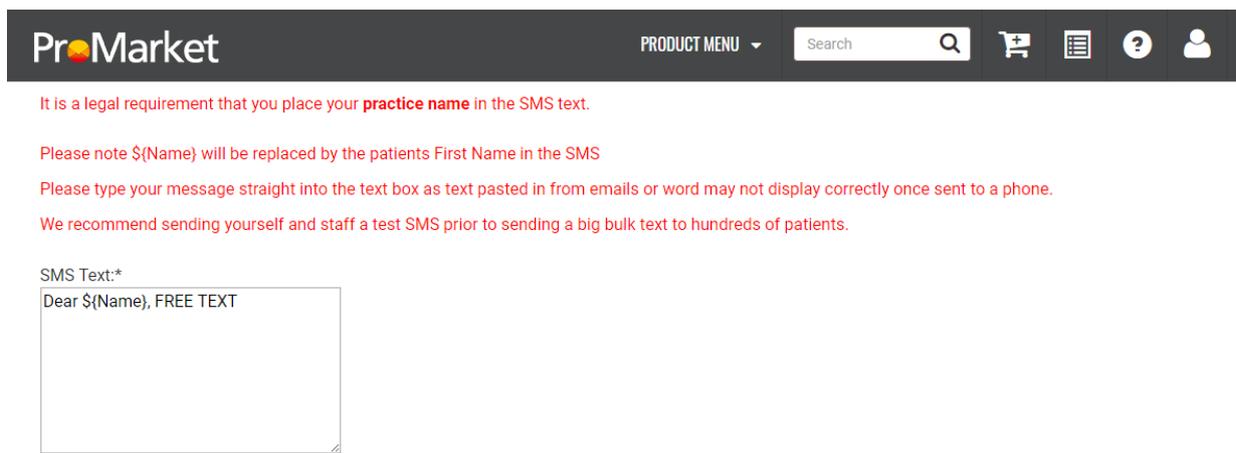
Enter your SMS from Name, this is the from name that will appear on your recipients phone (it can only be 11 characters long, no spaces or symbols)



Use the textbox provided to write your SMS.



Tips for writing SMS text correctly on ProMarket;

- Type your text directly into the text box on ProMarket, copying and pasting can sometimes take unwanted code from the original program over into the text box on ProMarket
- You are limited to 320 characters (including spaces). This includes your automated opt out message and patient name. Aim for a length of 285-290 characters to be safe
- It is a legal requirement to include your practice name in the text message
- We recommend including your practice phone number in the text message
- Please don't use symbols in your SMS, including an apostrophe (') on some older phones it presents as a question mark in the SMS text (a question mark ? can be used)
- You are able to change the 'Dear' to 'Hi' or something else, however refrain from editing the ${Name} as this is the code to pull in your patient's name from your data list

You have the ability to schedule the time and date in which your SMS will send out to your patients. Simply select the date and time using the Calendar and Clock icons.
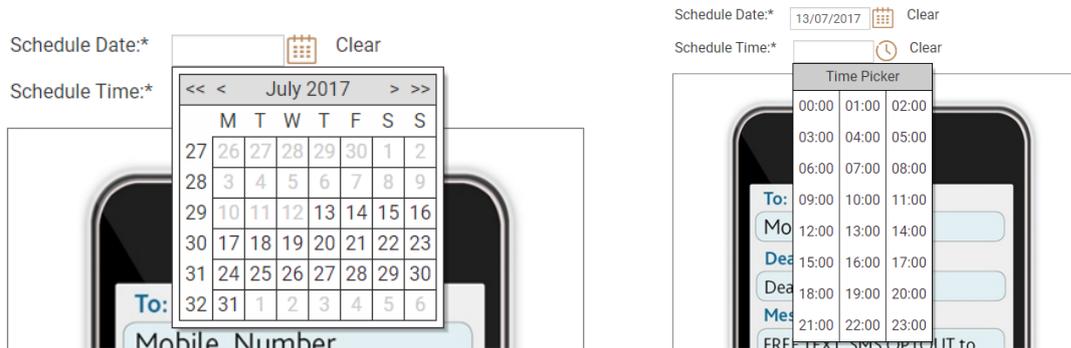


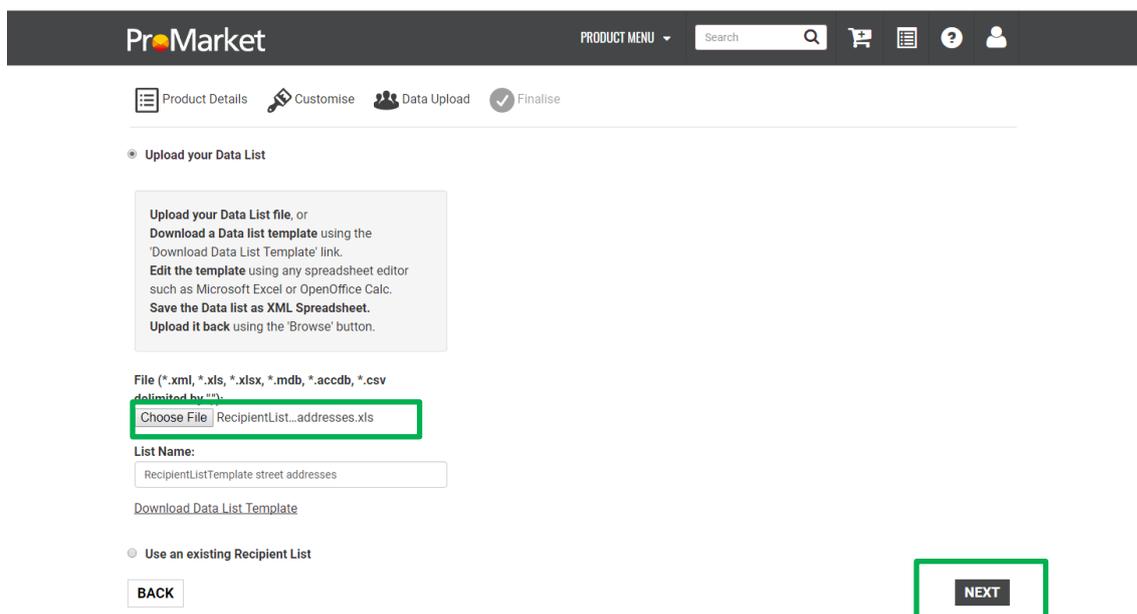TIP: if you would like to see how your product is looking, at the bottom of each page you have the option to 'Refresh Preview':



**Step 4. Upload your datalist created in Step 1**

Simply click on 'Choose File', select the file of choice and click Open.

**Step 5. Confirm your list**

You will now see a full list of all patients in your datalist. Check to see everything looks correct. Once you are happy click Next



**Step 6. Confirm your order**

This final page will show you all your order information including; delivery type, number of SMSs ordered, total cost of your order and also a final proof.

Click the **PROOF** button to view your order, using the little arrows in the top right hand corner to scroll through the different patient details. Ensure you check;



- Your text in the body of the SMS for spelling errors etc.
- Mobile numbers are pulling in correctly in the To: field
- Your patients name is showing in the Dear ${Name} field
- Note: your patient name will not show in the body of the text, only in the field above. This is the correct view of your proof. The final product will replace ${Name} with the patient name displayed above.

Once you are happy, tick SMS is approved and ADD TO CART (remember to complete your order you need to continue to check-out the items in your shopping cart)
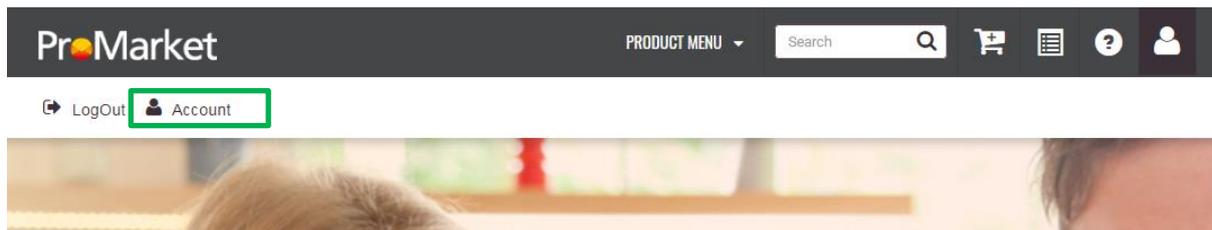
Your Account gives you access to your Order History, Addresses, Data Lists and Head Office Administration Board. When checking past orders you will be looking for Order History.

**Step 1. Click on your account**

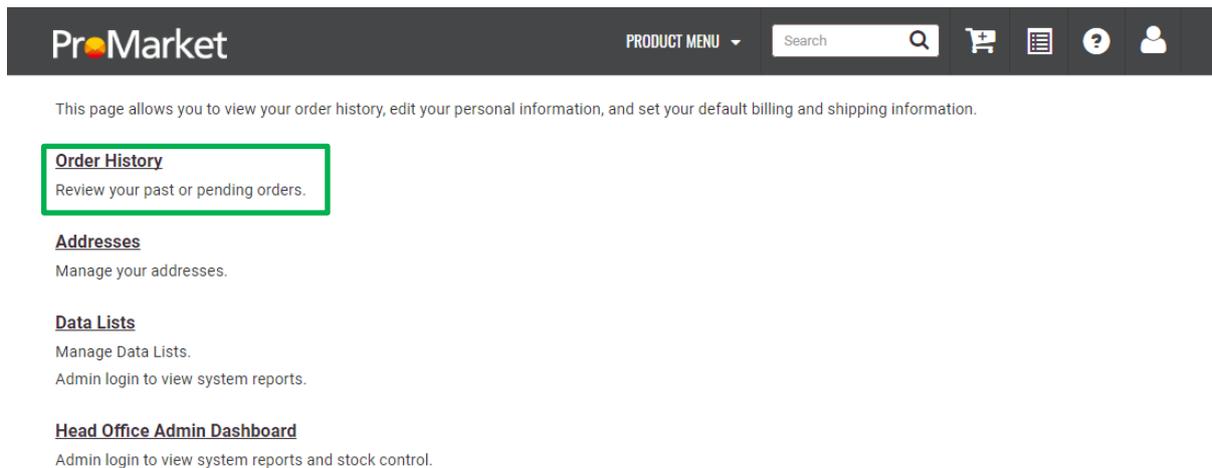Click the person icon in the top right hand corner of your screen =

Then select Account:



**Step 2. Click Order History**

Select order history to be taken to a list of your previous orders



**Step 3. Select the relevant past order**

You are provided a list of all your past orders so that you can review what was sent, print out your invoices to compare with your ProVision statement and re-order products previously ordered.

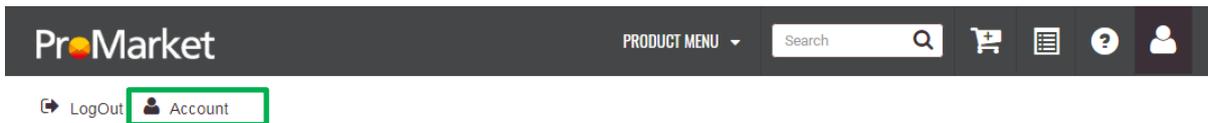| Order# | Order Date | Total Amount |
|--------|-----------|--------------|
| 308885 | 31/05/2017 | $30.29 |
| 858045 | 01/03/2017 | $30.11 |
| 451935 | 09/01/2017 | $0.75 |
| 581635 | 09/01/2017 | $0.75 |

If there is a product you tend to reorder again and again, ProMarket will allow you to clone a previously sent order, change the copy slightly and your datalist so that you do not need to start from scratch.
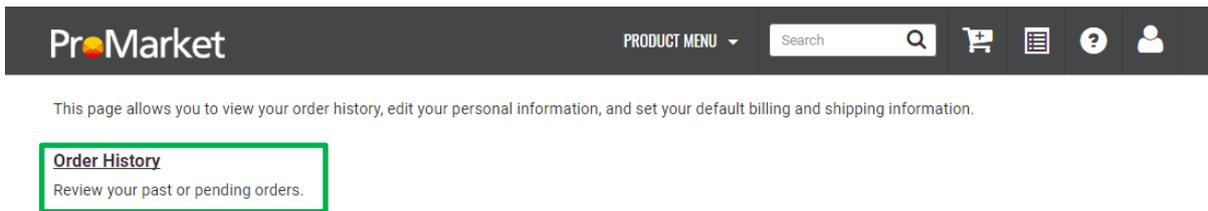
**Step 1. Make your way to order history**

Click the person icon in the top right hand corner of your screen =

Then select Account:



Select order history to be taken to a list of your previous orders
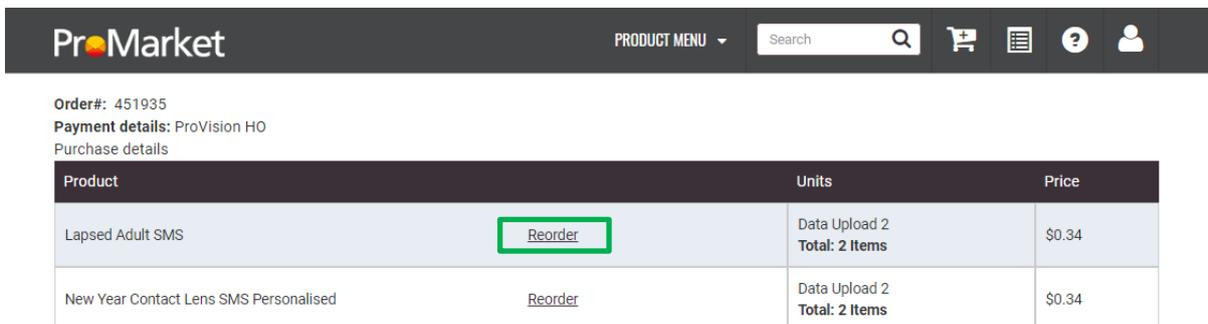


**Step 2. Add your order back into your shopping cart**

Click on the order number.

| Order# | Order Date | Total Amount |
|--------|-----------|--------------|
| 308885 | 31/05/2017 | $30.29 |
| 858045 | 01/03/2017 | $30.11 |
| 451935 | 09/01/2017 | $0.75 |

You will see a breakdown of the items ordered, simply click on 'Reorder'



This will add an exact replica of this order to your shopping cart. It is important to edit the product to change the schedule date, datalist and maybe even tweak the copy a little bit.

## Step 3. Edit your product

Select the edit button on your product in the shopping cart



ProMarket will take you to the final screen of editing your product.

Make your way through the product editing screens using the 'Back' and 'Next' buttons. Edit all relevant information and then make your way back to your Finalise screen:



The rest is the same process as ordering a product originally. Check your proof (or if an email, send yourself an email proof). Once you are happy tick the proof approval box and ADD TO CART.

(remember to complete your order you need to continue to check-out the items in your shopping cart)