

# ProMarket Instructions

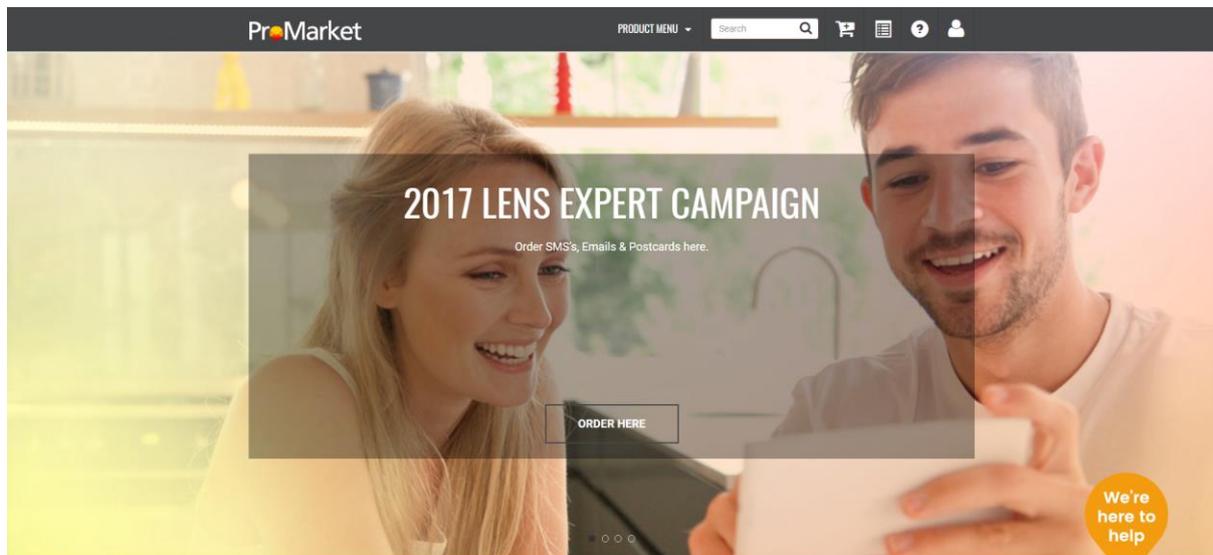


## Logging in, Placing an Order and Reordering

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;

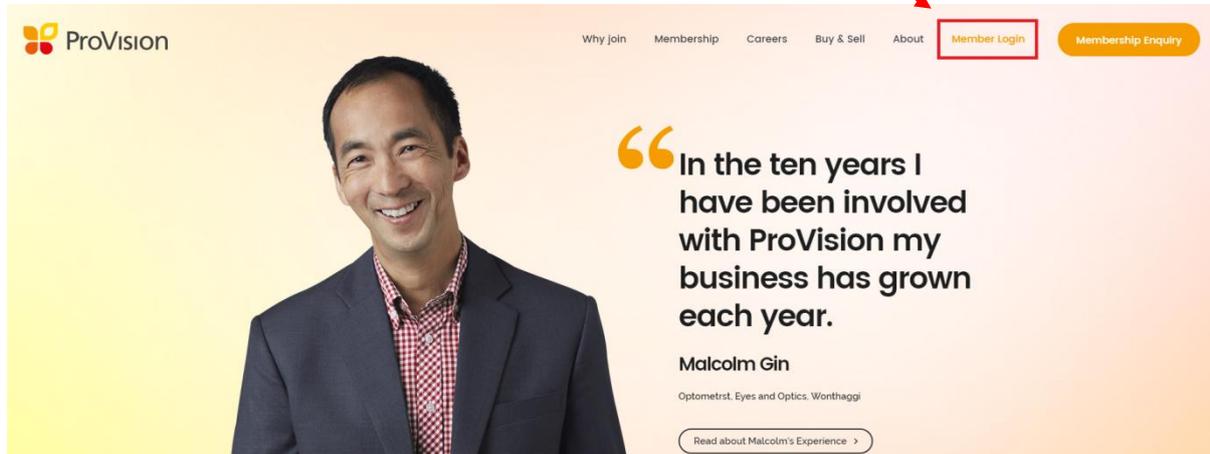
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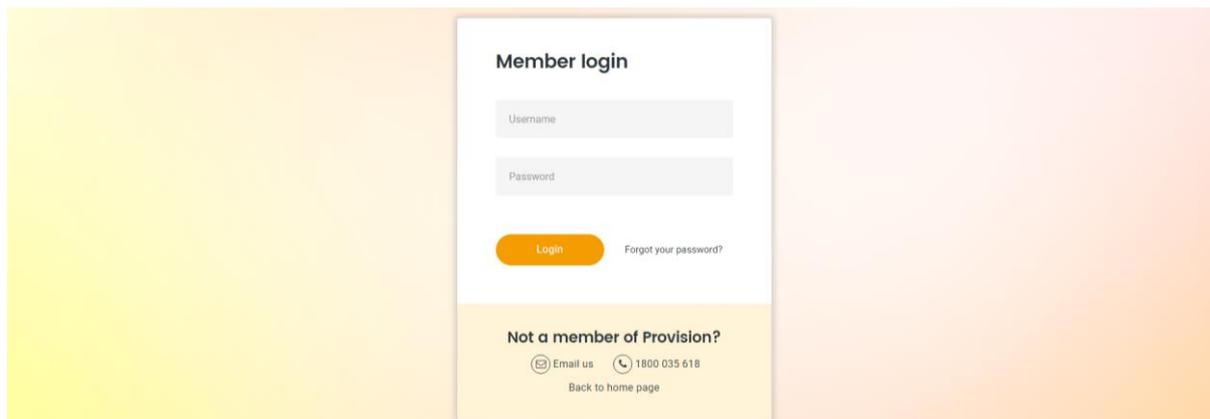
## Logging in and Navigating ProMarket.....Page 2 - 6

**Step 1.** Open your browser and head to <https://optom.provision.com.au/>

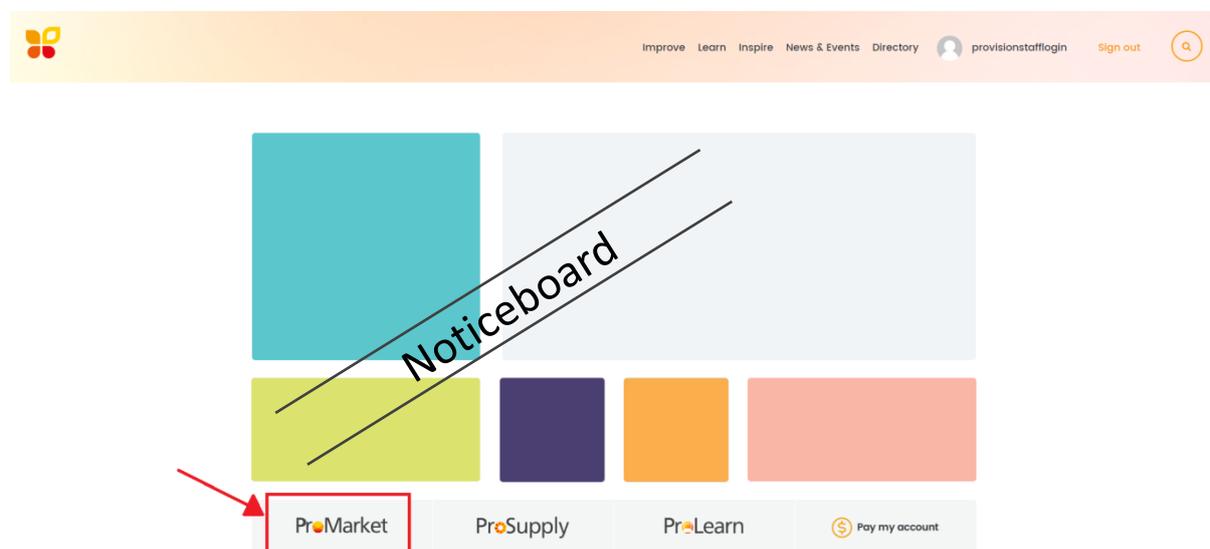
**Step 2.** Click on Member Login, to log into the secure member website



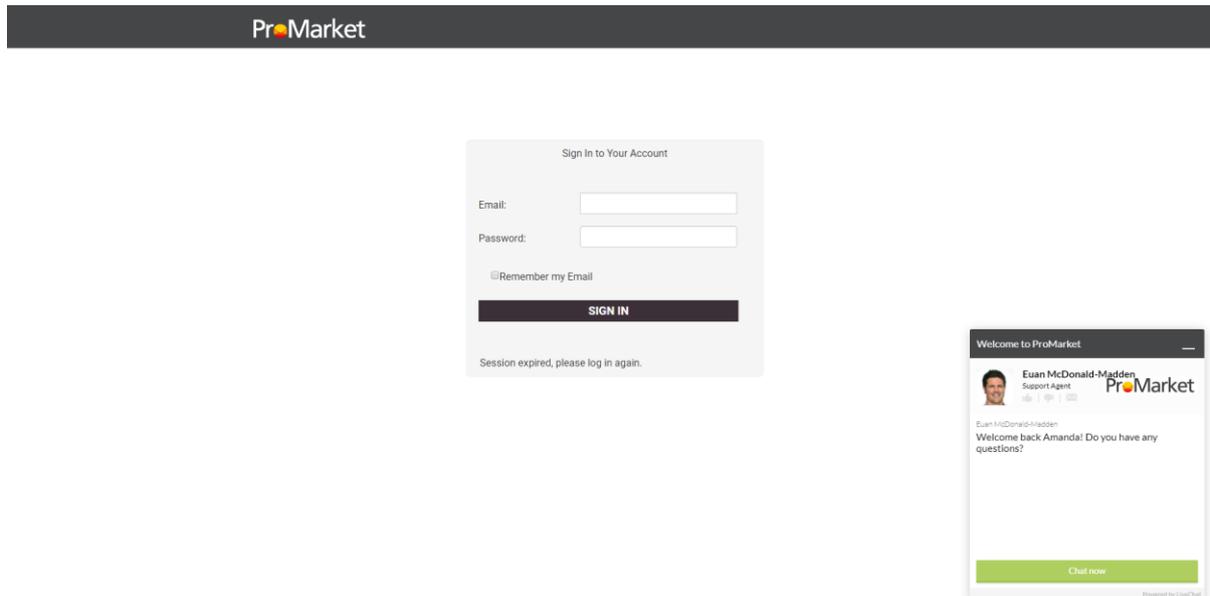
**Step 3.** Enter your username and password



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

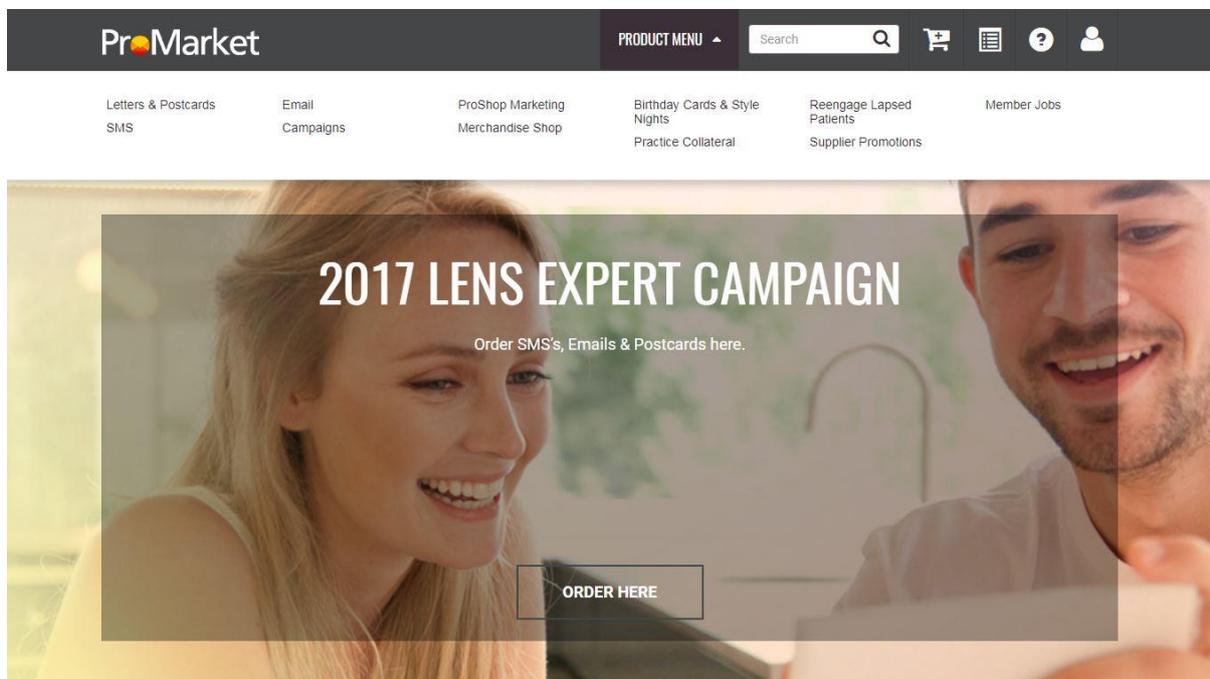


**Step 5.** Use your ProMarket username and password to log in and start browsing ProMarket products and templates



**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.

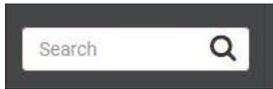
**Birthday Cards & Style Nights** - birthday card templates to send to patients on their birthday or to celebrate 1 year of owning their new glasses.

**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.

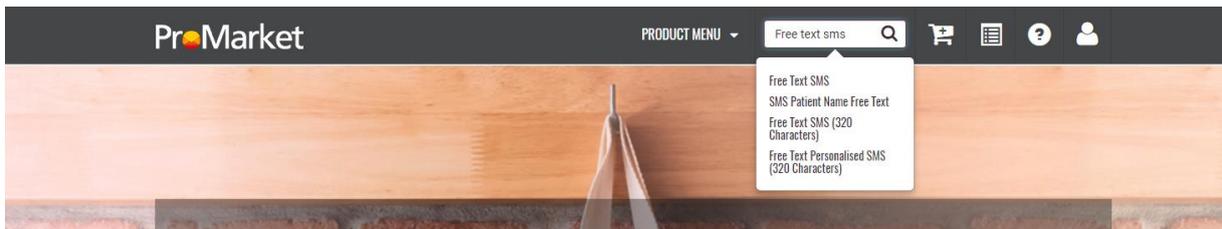
**Member Jobs** – We are able to design a custom template for your practice and upload it as a product for your future use. This is where you will have exclusive view of your dedicated product.



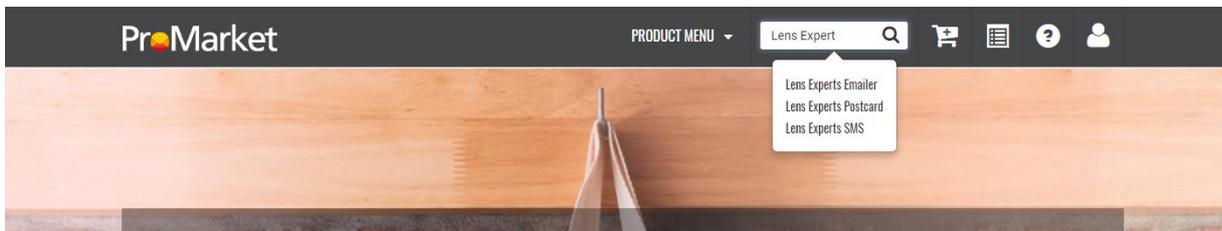
### Search Bar

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:

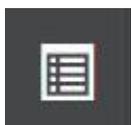


Or maybe you are looking for campaign materials, type in Lens Expert:



### 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.

Last Draft Orders [?](#)

Delete	Continue	Save	Product Name	Creation Date
			Free Text SMS	11/07/2017 14:09:43
			Lens Experts Emailer	11/07/2017 10:20:17

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.

The screenshot shows the ProMarket interface. At the top, there is a navigation bar with the ProMarket logo, a 'PRODUCT MENU' dropdown, a search bar, and icons for shopping cart, list, help, and user profile. Below the navigation bar, there are two sections:

**Last Draft Orders** (indicated by a blue question mark icon):

Delete	Continue	Save	Product Name	Creation Date
			Free Text SMS	11/07/2017 14:09:43
			Lens Experts Emailer	11/07/2017 10:20:17
			Lens Experts Postcard	07/07/2017 14:53:50

**Saved Draft Orders** (indicated by a green box around the header):

Delete	Continue	Product Name	Description	Creation Date
		Free Text Recall Letter with offer	22.01.2016PROV	22/01/2016 14:31:12



### 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
<a href="#">308885</a>	31/05/2017	\$30.29
<a href="#">858045</a>	01/03/2017	\$30.11
<a href="#">451935</a>	09/01/2017	\$0.75
<a href="#">581635</a>	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](mailto: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.

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:

	A	B	C	D	E	F	G	H	I
1	Title	First Name	Surname	Address1	Address2	Address3	Suburb	State	Postcode
2									
3									
4									
5									

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.

**ProMarket** PRODUCT MENU Search

HOME > LETTERS & POSTCARDS > RECALL POSTCARDS

**FREE TEXT POSTCARDS**

Choose from 8 different images and use the free text postcard to communicate an in practice offer or message. Use a matching free text email template for a multichannel communication.

FROM **\$1.38**

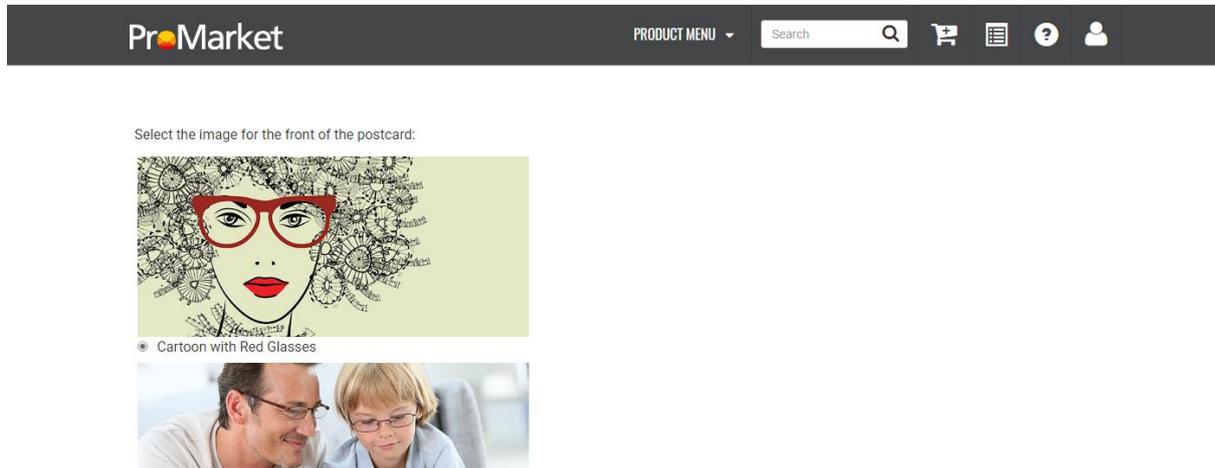
**CONTINUE** →

Click continue to get started

### Step 3. Select your image

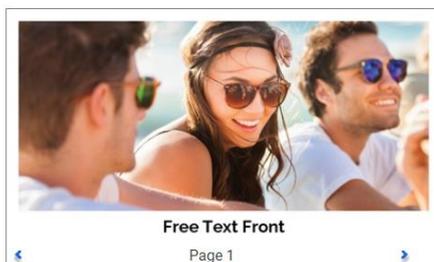
Note: Each product is slightly different, for this example we are taking you through the content in the Free Text Postcard template.

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



The screenshot shows the ProMarket website header with the logo, a 'PRODUCT MENU' dropdown, a search bar, and icons for shopping cart, list, help, and user profile. Below the header, the text 'Select the image for the front of the postcard:' is displayed. Two image options are shown: a cartoon illustration of a woman with red glasses and a photograph of a man and a child. The cartoon option is selected, indicated by a radio button and the label 'Cartoon with Red Glasses'.

Once selected, click next



REFRESH PREVIEW

\*Indicates a required field

BACK

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.

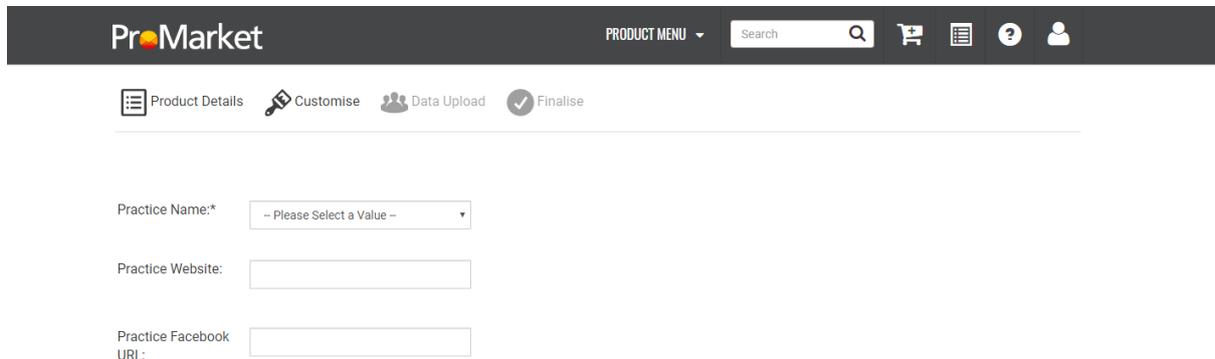
Free Text Front:\*

Free Text Heading:\*

Free Text:\*

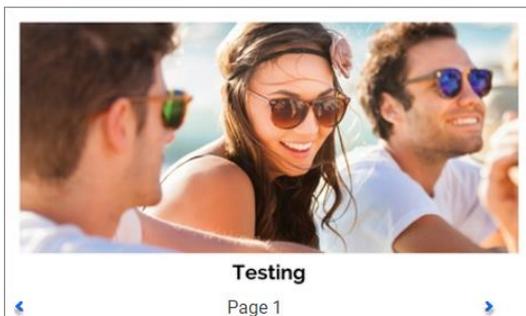
## Step 5. Select your practice details

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



The screenshot shows the ProMarket interface for Step 5. The navigation bar includes 'PRODUCT MENU', a search bar, and icons for shopping cart, list, help, and user. Below the navigation bar, there are four tabs: 'Product Details', 'Customise', 'Data Upload', and 'Finalise' (which is active). The form contains three fields: 'Practice Name\*' with a dropdown menu showing '-- Please Select a Value --', 'Practice Website:' with a text input field, and 'Practice Facebook URL:' with a text input field.

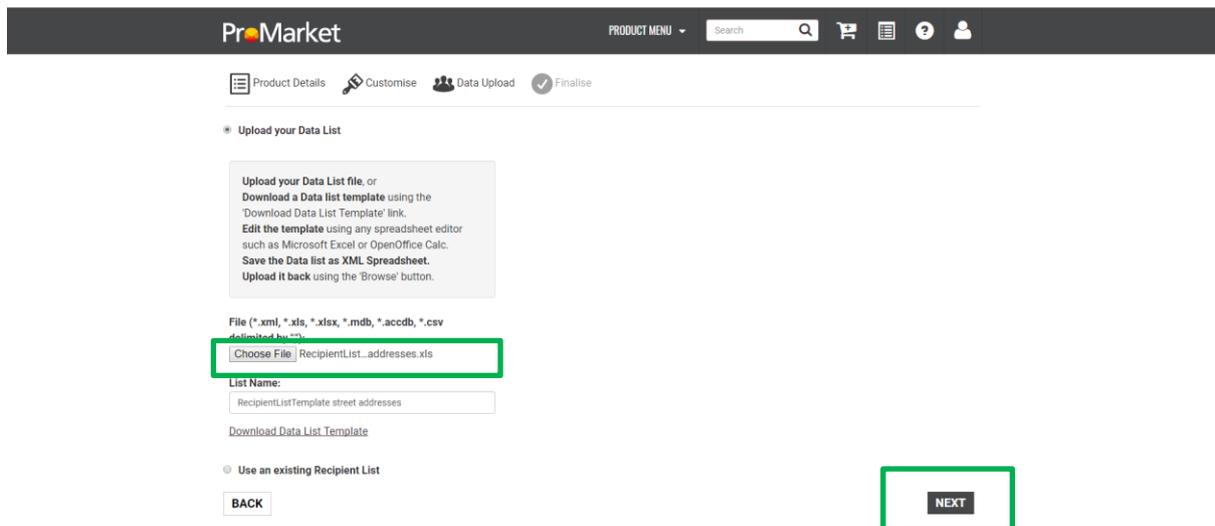
TIP: if you would like to see how your product is looking, at the bottom of each page you have the option to 'Refresh Preview':



REFRESH PREVIEW

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

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

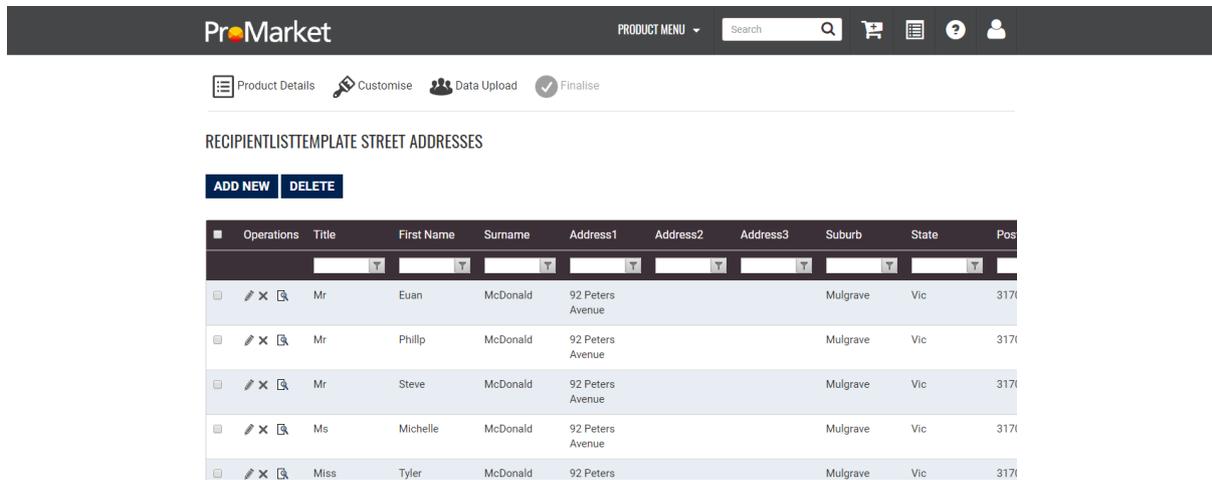


The screenshot shows the ProMarket interface for Step 6. The navigation bar is the same as in Step 5. Below the navigation bar, there are four tabs: 'Product Details', 'Customise', 'Data Upload', and 'Finalise' (which is active). The form is titled 'Upload your Data List'. It contains a text box with instructions: 'Upload your Data List file, or Download a Data list template using the "Download Data List Template" link. Edit the template using any spreadsheet editor such as Microsoft Excel or OpenOffice Calc. Save the Data list as XML Spreadsheet. Upload it back using the "Browse" button.' Below this, there is a file selection area with a 'Choose File' button highlighted in green. The selected file is 'RecipientList\_addresses.xls'. Below the file selection, there is a 'List Name:' field with the text 'RecipientListTemplate street addresses'. There is a 'Download Data List Template' link. At the bottom, there is a 'Use an existing Recipient List' radio button, a 'BACK' button, and a 'NEXT' button highlighted in green.

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

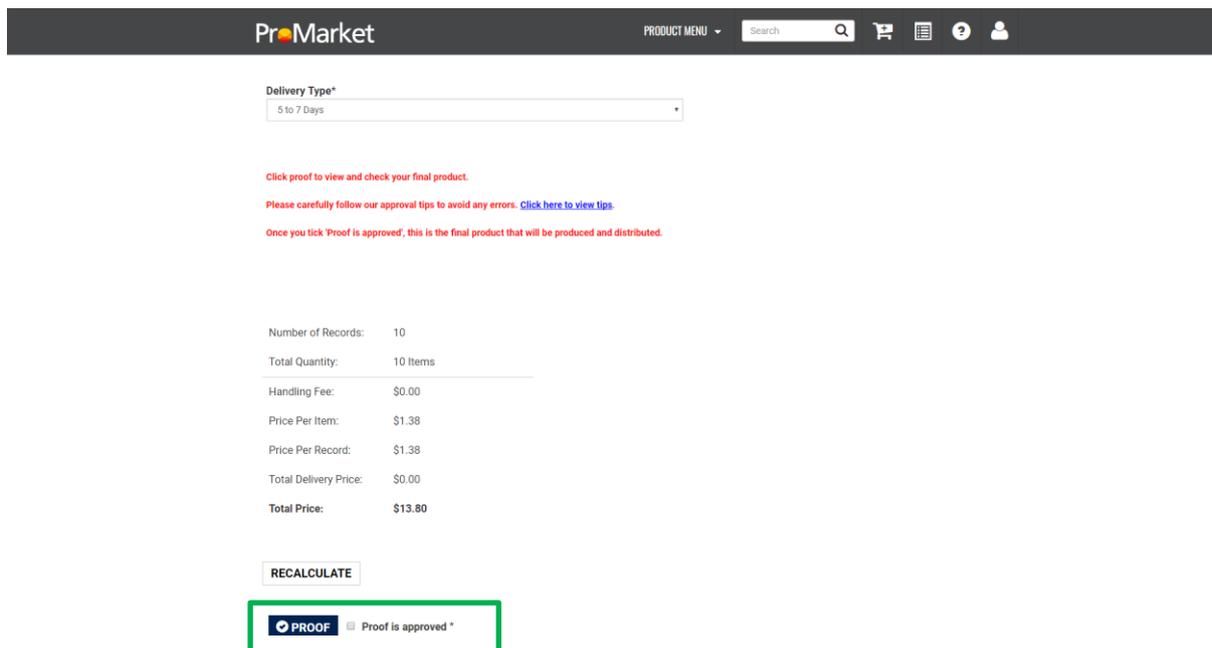


The screenshot shows the ProMarket interface. At the top, there is a navigation bar with the ProMarket logo, a 'PRODUCT MENU' dropdown, a search bar, and icons for shopping cart, list, help, and user profile. Below the navigation bar, there are four tabs: 'Product Details', 'Customise', 'Data Upload', and 'Finalise'. The main content area is titled 'RECIPIENTLISTTEMPLATE STREET ADDRESSES'. It features two buttons: 'ADD NEW' and 'DELETE'. Below these buttons is a table with the following columns: Operations, Title, First Name, Surname, Address1, Address2, Address3, Suburb, State, and Postcode. The table contains five rows of patient data:

Operations	Title	First Name	Surname	Address1	Address2	Address3	Suburb	State	Postcode
<input type="checkbox"/> <input type="pencil"/> <input type="x"/> <input type="refresh"/>	Mr	Euan	McDonald	92 Peters Avenue			Mulgrave	Vic	3171
<input type="checkbox"/> <input type="pencil"/> <input type="x"/> <input type="refresh"/>	Mr	Phillip	McDonald	92 Peters Avenue			Mulgrave	Vic	3171
<input type="checkbox"/> <input type="pencil"/> <input type="x"/> <input type="refresh"/>	Mr	Steve	McDonald	92 Peters Avenue			Mulgrave	Vic	3171
<input type="checkbox"/> <input type="pencil"/> <input type="x"/> <input type="refresh"/>	Ms	Michelle	McDonald	92 Peters Avenue			Mulgrave	Vic	3171
<input type="checkbox"/> <input type="pencil"/> <input type="x"/> <input type="refresh"/>	Miss	Tyler	McDonald	92 Peters			Mulgrave	Vic	3171

## 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.



The screenshot shows the ProMarket interface for order confirmation. At the top, there is a navigation bar with the ProMarket logo, a 'PRODUCT MENU' dropdown, a search bar, and icons for shopping cart, list, help, and user profile. Below the navigation bar, there is a 'Delivery Type\*' dropdown menu set to '5 to 7 Days'. Below this, there are three lines of red text: 'Click proof to view and check your final product.', 'Please carefully follow our approval tips to avoid any errors. [Click here to view tips.](#)', and 'Once you tick 'Proof is approved', this is the final product that will be produced and distributed.' Below the text, there is a table with the following information:

Number of Records:	10
Total Quantity:	10 Items
Handling Fee:	\$0.00
Price Per Item:	\$1.38
Price Per Record:	\$1.38
Total Delivery Price:	\$0.00
<b>Total Price:</b>	<b>\$13.80</b>

Below the table, there is a 'RECALCULATE' button. At the bottom, there is a 'PROOF' button with a checkmark icon and a 'Proof is approved \*' checkbox.

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)

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):

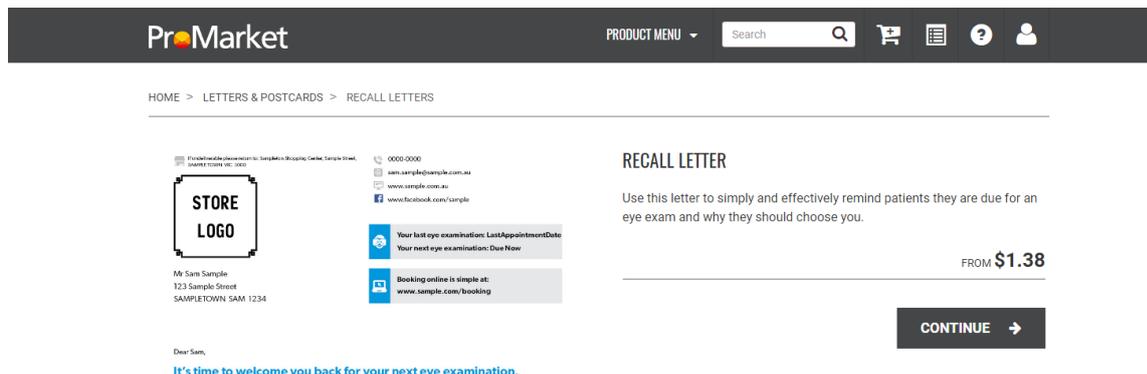
	A	B	C	D	E	F	G	H	I	J
1	Title	First Name	Surname	Address1	Address2	Address3	Suburb	State	Postcode	LastAppointmentDate
2										
3										
4										
5										
6										
7										
8										

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

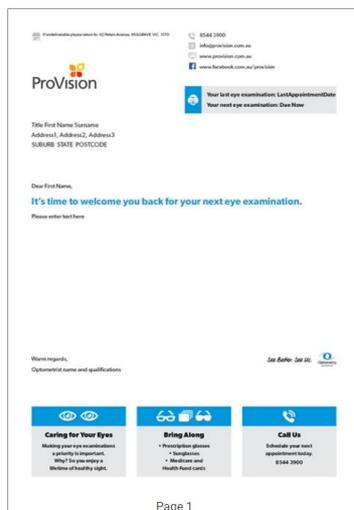
### Step 3. Select your practice details

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.

The screenshot shows the 'Finalise' step in the ProMarket interface. At the top, there's a navigation bar with 'ProMarket', 'PRODUCT MENU', a search bar, and icons for shopping cart, list, help, and user. Below this is a progress bar with four steps: 'Product Details', 'Customise', 'Data Upload', and 'Finalise' (which is active). The main content area contains four form fields: 'Practice Name:\*' with a dropdown menu showing '-- Please Select a Value --', 'Practice Website:', 'Practice Facebook URL: [what's this?]', and 'Online Booking URL: [what's this?]'.

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':



REFRESH PREVIEW

### Step 4. Design your letter

Select your desired heading from the dropdown options:

The screenshot shows the 'Finalise' step in the ProMarket interface, focusing on letter design. The navigation bar and progress bar are the same as in Step 3. The main content area has two form fields: 'Heading Text:\*' with a dropdown menu showing '-- Please Select a Value --' and 'Letter Colour:\*' with a color selection tool. The color selection tool shows a blue box selected over a purple box, with a preview of the text 'We haven't seen you in a while. It's time to welcome you back for your next eye examination.' in the selected blue color.

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

Letter Colour:\*

<input type="radio"/> Aqua Blue	<input type="radio"/> Storm Grey	<input type="radio"/> Mint Green	<input type="radio"/> Purple Gem
<input type="radio"/> Burnt Red	<input checked="" type="radio"/> Burnt Orange	<input type="radio"/> Bright Red	<input type="radio"/> Citrus Green
<input type="radio"/> Green Leaf	<input type="radio"/> Orange Juice	<input type="radio"/> Dark Sea Blue	<input type="radio"/> Deep Sea Blue
<input type="radio"/> Dove Grey	<input type="radio"/> Brilliant Blue	<input type="radio"/> Deep Orange	<input type="radio"/> Emerald Green
<input type="radio"/> Grape Juice	<input type="radio"/> Yellow Sun	<input type="radio"/> Heritage	<input type="radio"/> Grey Sky

Finally choose to include the See Better. See Us. and/or Optometry Australia logo.

Include See Better See Us Logo?\*

Include Opt Aust Logo?\*

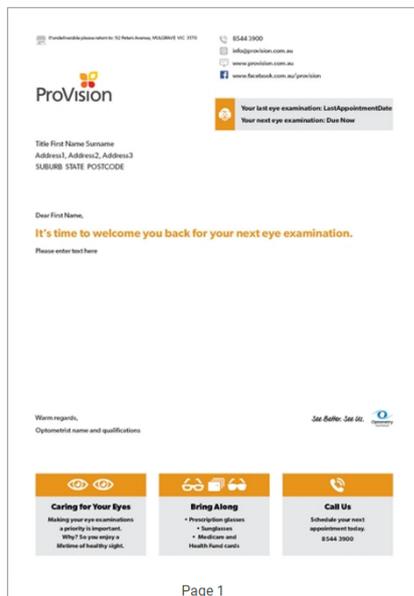
-- Please Select a Value --

-- Please Select a Value --

Yes

No

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



**REFRESH PREVIEW**

\*Indicates a required field

**BACK**

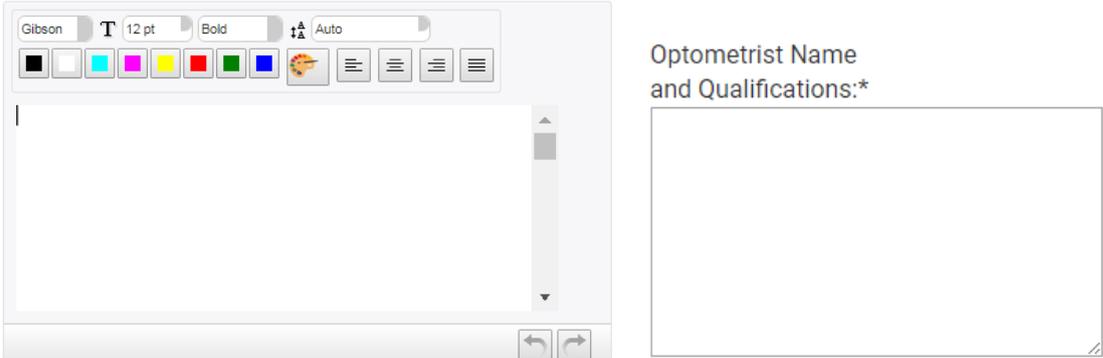
**NEXT**

## 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).

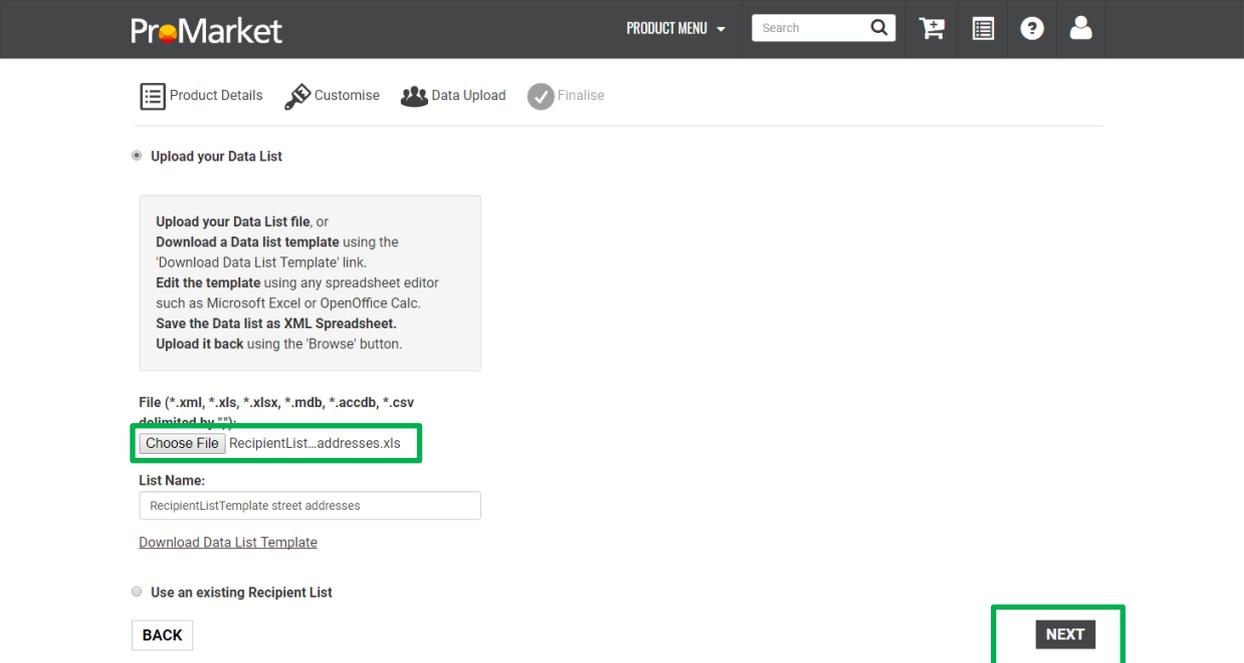
TIP: it is best to type your text directly into the text box on ProMarket, copying and pasting can sometimes take unwanted code from the original program over into the text box on ProMarket.

Letter Text:\*



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

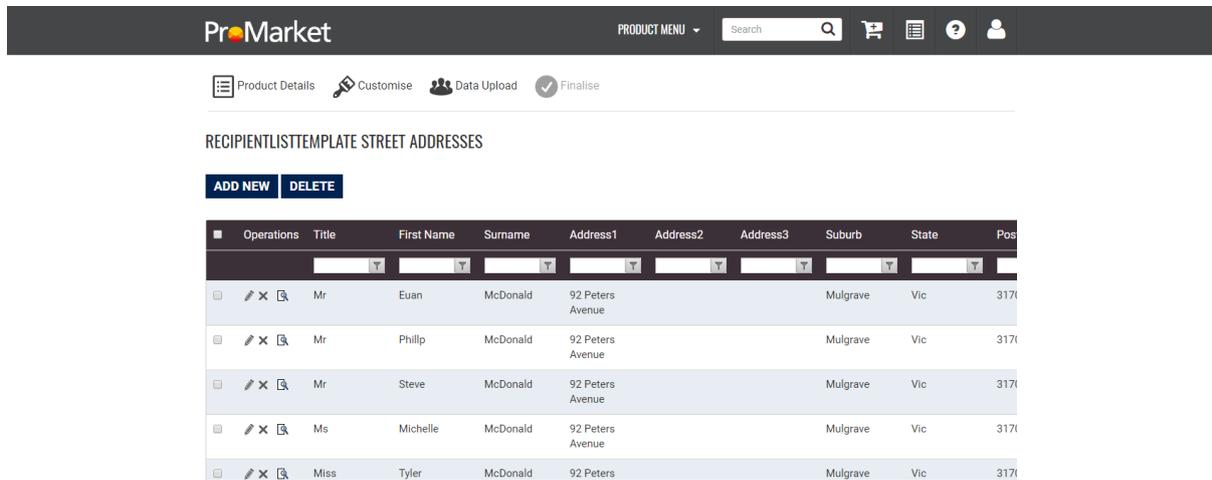
Simply click on 'Choose File', select the file of choice and click Open



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

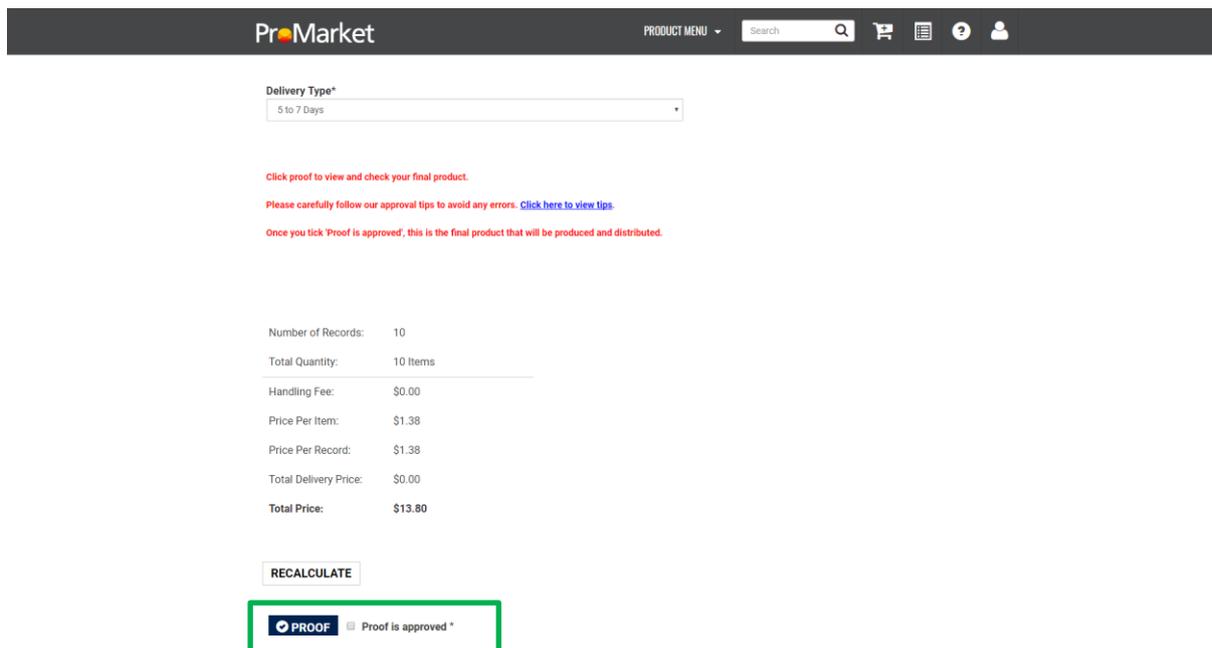


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Operations	Title	First Name	Surname	Address1	Address2	Address3	Suburb	State	Postcode
<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	Mr	Euan	McDonald	92 Peters Avenue			Mulgrave	Vic	3171
<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	Mr	Phillip	McDonald	92 Peters Avenue			Mulgrave	Vic	3171
<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	Mr	Steve	McDonald	92 Peters Avenue			Mulgrave	Vic	3171
<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	Ms	Michelle	McDonald	92 Peters Avenue			Mulgrave	Vic	3171
<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	Miss	Tyler	McDonald	92 Peters			Mulgrave	Vic	3171

## 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.



The screenshot shows the ProMarket interface for order confirmation. At the top, there is a navigation bar with the ProMarket logo, a 'PRODUCT MENU' dropdown, a search bar, and icons for shopping cart, list, help, and user profile. Below the navigation bar, there is a 'Delivery Type\*' dropdown menu with '5 to 7 Days' selected. Below the dropdown, there are three lines of red text: 'Click proof to view and check your final product.', 'Please carefully follow our approval tips to avoid any errors. [Click here to view tips.](#)', and 'Once you tick 'Proof is approved', this is the final product that will be produced and distributed.' Below the text, there is a table with the following information:

Number of Records:	10
Total Quantity:	10 Items
Handling Fee:	\$0.00
Price Per Item:	\$1.38
Price Per Record:	\$1.38
Total Delivery Price:	\$0.00
<b>Total Price:</b>	<b>\$13.80</b>

Below the table, there is a 'RECALCULATE' button. At the bottom, there is a 'PROOF' button with a checkmark icon and a 'Proof is approved \*' checkbox.

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

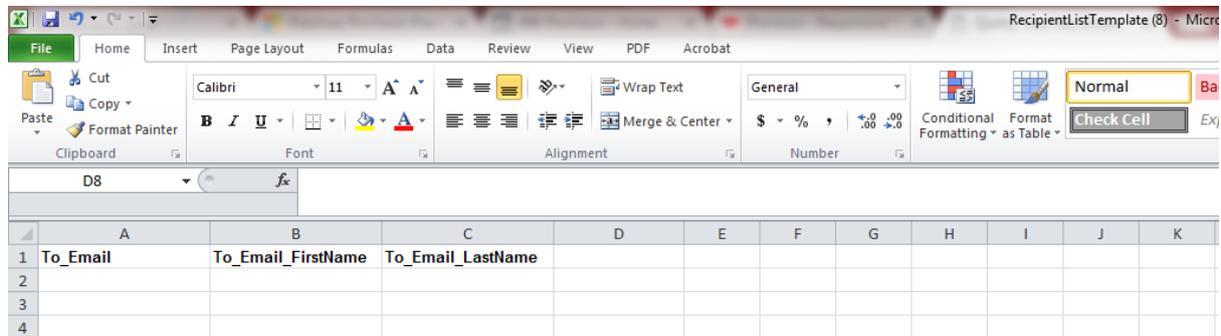
Once you are happy, tick Proof is approved and ADD TO CART (remember to complete your order you need to continue to check-out the items in your shopping cart)

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):

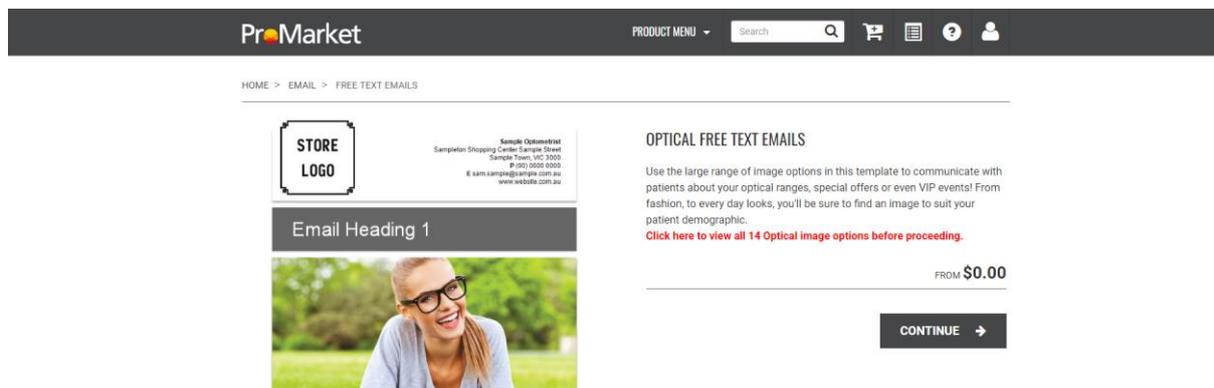


- To\_Email – provide the patients email address
- To\_Email\_FirstName – provide the patients first name
- To\_Email\_LastName – provide the patients last name

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.

**ProMarket** PRODUCT MENU

Product Details Customise Data Upload Finalise

**PLEASE LIMIT EMAIL SUBJECT TO 100 CHARACTERS**

Practice Name:\*

Practice Website:

Email Subject:\*

### 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.

Select the image for the email:



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.

The screenshot shows the ProMarket interface at the 'Finalise' stage. The top navigation bar includes the ProMarket logo, a 'PRODUCT MENU' dropdown, a search bar, and icons for shopping cart, list, help, and user profile. Below the navigation bar, a progress bar shows four steps: 'Product Details', 'Customise', 'Data Upload', and 'Finalise' (which is active). The main content area contains three input fields: 'Heading 1:\*' (a single-line text box), 'Heading 2:\*' (a single-line text box), and 'Free Text:\*' (a larger multi-line text area). Below these is a 'Terms and Conditions:' section with a text box containing the placeholder 'Please enter terms and conditions her'. To the right, a preview of the email template is shown. The preview includes a 'STORE LOGO' placeholder, contact information for 'Sample Shopping Center', 'Email Heading 1' (highlighted in yellow), a placeholder image of a woman reading, 'Email Heading 2' (highlighted in yellow), a personalized greeting 'Hi To\_Email\_firstname', and a 'Please enter text here' placeholder. The preview is labeled 'Page 1' at the bottom.

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

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

The screenshot shows the ProMarket interface at the 'Upload your Data List' step. The top navigation bar is identical to the previous screenshot. The progress bar shows 'Upload your Data List' as the active step. The main content area features a grey box with instructions: 'Upload your Data List file, or Download a Data list template using the 'Download Data List Template' link. Edit the template using any spreadsheet editor such as Microsoft Excel or OpenOffice Calc. Save the Data list as XML Spreadsheet. Upload it back using the 'Browse' button.' Below this, a file upload section is titled 'File (\*.xml, \*.xls, \*.xlsx, \*.mdb, \*.accdb, \*.csv delimited by "")'. A 'Choose File' button is highlighted with a green box, and the filename 'RecipientList...addresses.xls' is displayed. Below the file name is a 'List Name:' text box containing 'RecipientListTemplate street addresses'. A link 'Download Data List Template' is provided. At the bottom, there is a radio button for 'Use an existing Recipient List' and a 'BACK' button. A 'NEXT' button is highlighted with a green box.

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

ProMarket

PRODUCT MENU Search

Product Details Customise Data Upload Finalise

RECIPIENTLISTTEMPLATE EMAIL LIST

ADD NEW DELETE

Operations	To_Email	To_Email_FirstName	To_Email_LastName
<input type="checkbox"/>	aerotberg@provision.com.au	Amanda	Rotberg

Change page: 1 of 1 GO Page size: 1 CHANGE | Displaying page 1 of 1, items 1 to 1 of 1.

Number of Records: 1

Change Data List

BACK 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:

ProMarket

PRODUCT MENU Search

Product Details Customise Data Upload Finalise

Schedule e-mail sending time\*

Calendar: July 2017

Clear

All times stated are Eastern Standard Time, please allow 15 minutes for Western Australia and 30 minutes for South Australia and Northern Territory orders.

Important Notice: You are about to send an e-mail campaign. Please note: Under the SPAM Act you must have your recipient's consent to receive electronic communications. If you do not have their consent, please do not proceed with sending this e-Campaign.

ProMarket

PRODUCT MENU Search

Product Details Customise Data Upload Finalise

Schedule e-mail sending time\* 13/07/2017

Time Picker

00:00 01:00 02:00  
03:00 04:00 05:00  
06:00 07:00 08:00  
09:00 10:00 11:00  
12:00 13:00 14:00  
15:00 16:00 17:00  
18:00 19:00 20:00  
21:00 22:00 23:00

Clear

All times stated are Eastern Standard Time, please allow 15 minutes for Western Australia and 30 minutes for South Australia and Northern Territory orders.

Important Notice: You are about to send an e-mail campaign. Please note: Under the SPAM Act you must have your recipient's consent to receive electronic communications. If you do not have their consent, please do not proceed with sending this e-Campaign.

You will need to add your Free Text Email to your cart in order to send the test email in order to maintain your personalised message.

You cannot access your changes in Drafts. We therefore recommend you create a Word document with your personalised wording that you save and then simply copy and paste into the Free Text Email field.

## 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'

Proof is approved  
Before you tick the box, **send an email proof to your email address** to review your order. View approval tips in the link above. \*

Send Email Proof to:

E-mail address:

arotberg@provision.com.au

**SEND EMAIL PROOF**

**BACK**

**ADD TO CART**

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)

Proof is approved  
Before you tick the box, **send an email proof to your email address** to review your order. View approval tips in the link above. \*

Send Email Proof to:

E-mail address:

arotberg@provision.com.au

**SEND EMAIL PROOF**

**BACK**

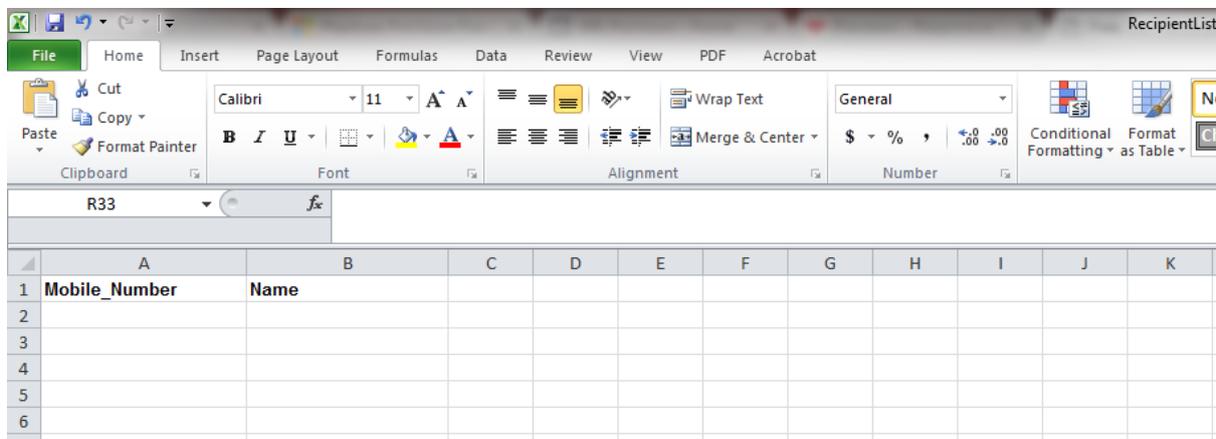
**ADD TO CART**

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):

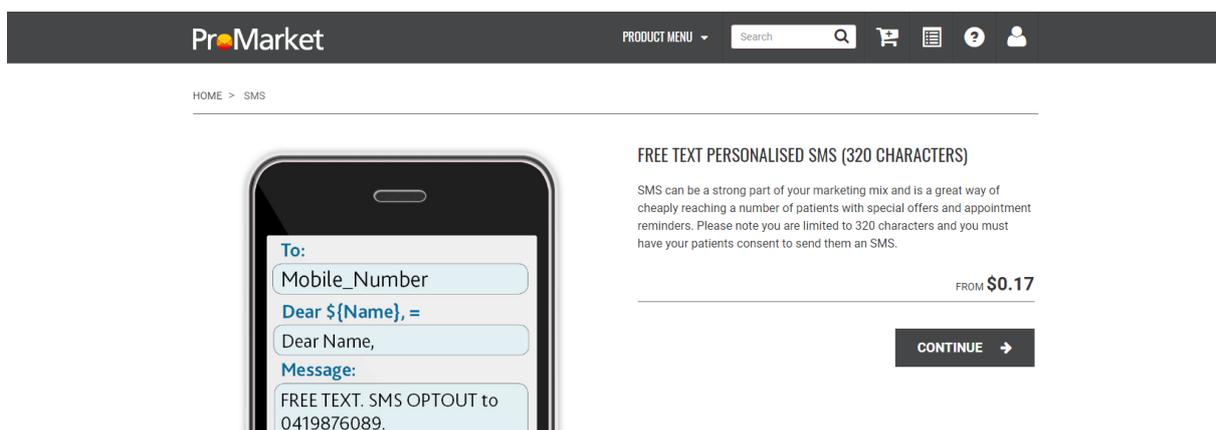


Mobile\_Number – ProMarket will accept a mobile number without the 0 at the front (for example 411 111 111), it will not, however, accept a mobile number with dashes (for example 0411-111-111)

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.

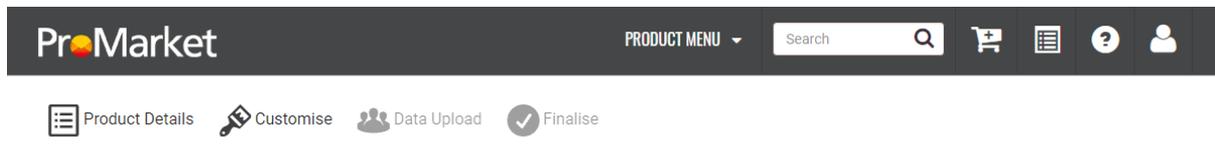
**Step 2. Using either the search bar or through navigating the product menu find the SMS you would like to use.** For this example we are using the Free Text Personalised SMS (320 Characters).



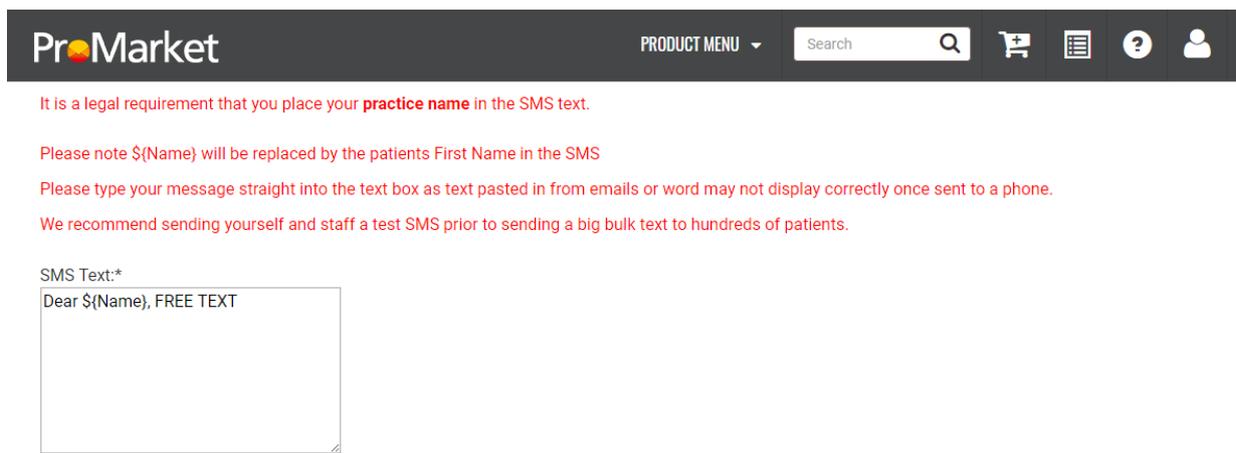
### Step 3. Build your SMS

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)



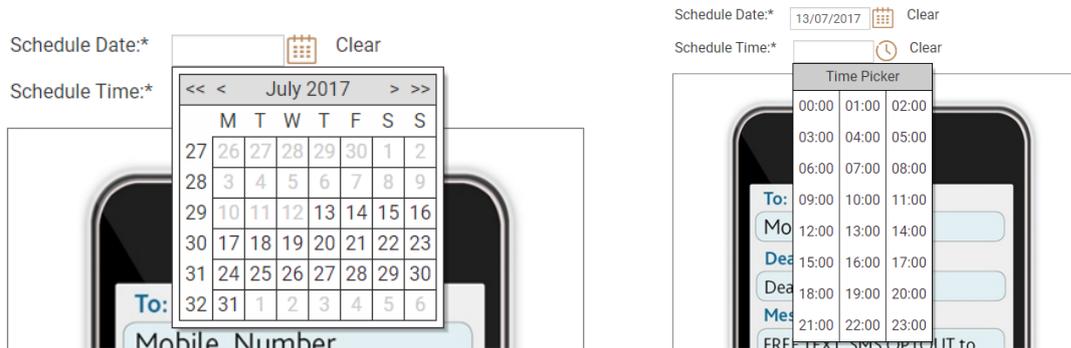
Use the textbox provided to write your SMS.



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.



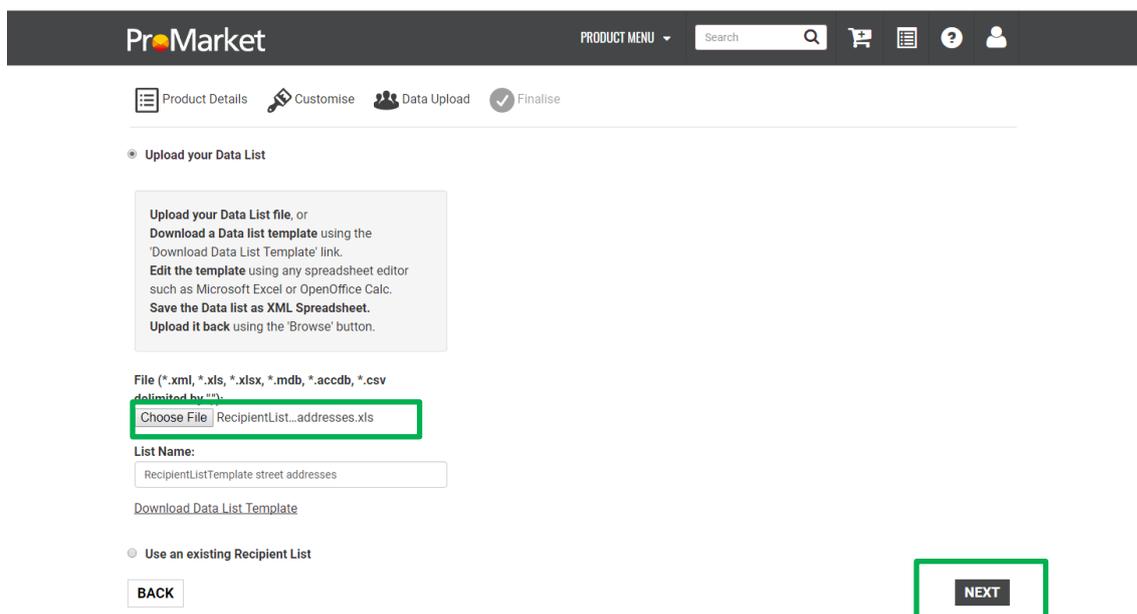
TIP: if you would like to see how your product is looking, at the bottom of each page you have the option to 'Refresh Preview':



**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

ProMarket

PRODUCT MENU Search

Product Details Customise Data Upload Finalise

RECIPIENTLISTTEMPLATE MOBILE NUMBERS

ADD NEW DELETE

Operations	Mobile_Number	Name
	0411111111	Amanda

Change page: 1 of 1 GO Page size: 1 CHANGE | Displaying page 1 of 1, items 1 to 1 of 1.

Number of Records: 1

Change Data List

BACK 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)

PROOF  SMS is approved \*

BACK ADD TO CART

## Checking Past Orders.....Page 26

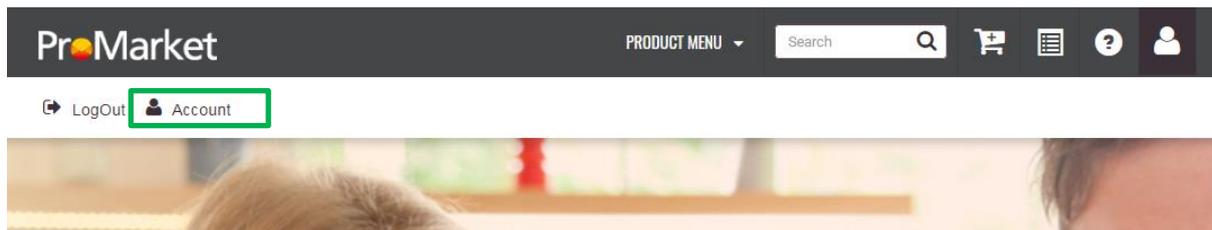
Your Account gives you access to your Order History, Addresses, Data Lists and Head Office Administration Board. When checking past orders you will be looking for Order History.

### Step 1. Click on your account

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

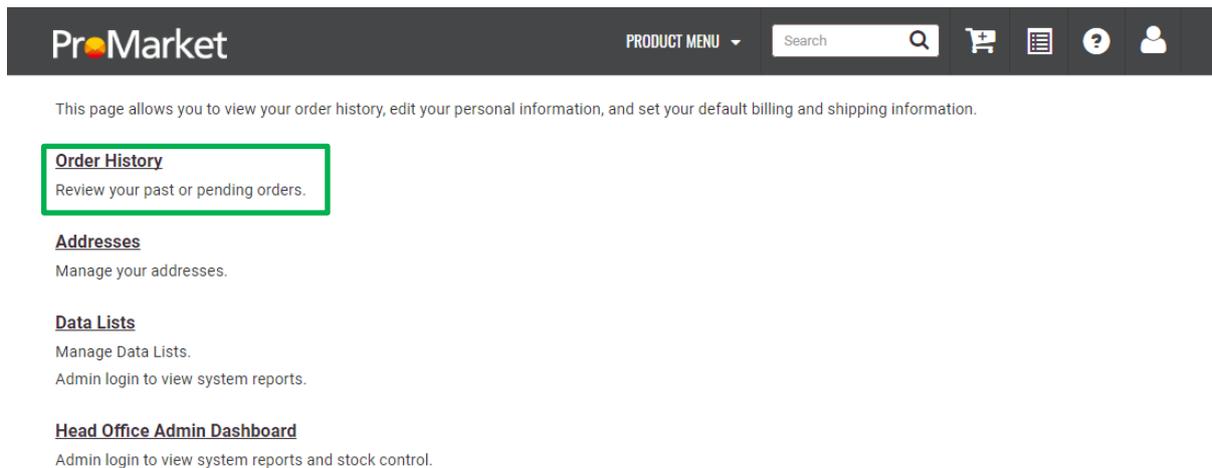


Then select Account:



### 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

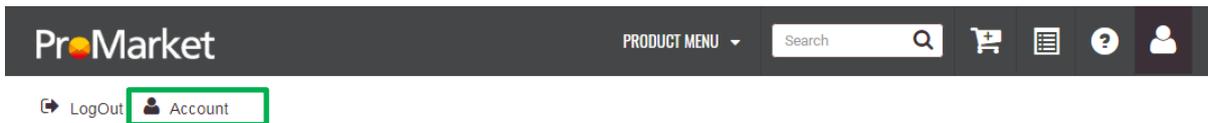
If there is a product you tend to reorder again and again, ProMarket will allow you to clone a previously sent order, change the copy slightly and your datalist so that you do not need to start from scratch.

**Step 1. Make your way to order history**

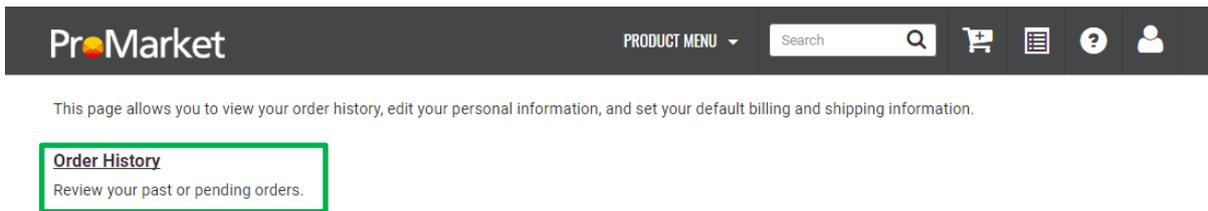


Click the person icon in the top right hand corner of your screen =

Then select Account:



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

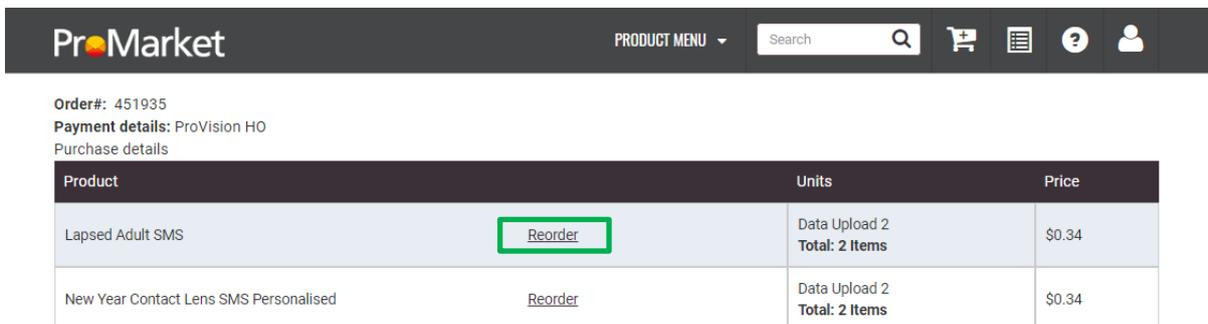


**Step 2. Add your order back into your shopping cart**

Click on the order number.

Order#	Order Date	Total Amount
<a href="#">308885</a>	31/05/2017	\$30.29
<a href="#">858045</a>	01/03/2017	\$30.11
<a href="#">451935</a>	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

Name	Units	Price
  <b>Lapsed Adult SMS</b>	Data Upload 2 Quantity Per Record: 1 Items Total: 2 Items	\$0.34

Subtotal \$0.34

[CONTINUE SHOPPING](#) [REORDER MORE PRODUCTS](#) [CHECKOUT](#)

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:

Product Details Customise Data Upload **Finalise**

Click proof to view and check your final product.

Please carefully follow our approval tips to avoid any errors. [Click here to view tips.](#)

Once you tick 'Proof is approved', this is the final product that will be produced and distributed.

Number of Records:	2
Total Quantity:	2 Items
Handling Fee:	\$0.00
Price Per Item:	\$0.17
Price Per Record:	\$0.17
Total Delivery Price:	\$0.00
Total Price:	\$0.34

**PROOF** SMS is approved \*

[BACK](#) [ADD TO CART](#)

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)