

Personalised Fax Marketing Instructions



A. Prepare your Fax database

1. Enter your Fax contacts into an **Excel spreadsheet** and save the Excel file in **csv (comma delimited)** format. **Close** the csv file and **reopen** this file to begin formatting.
2. Make sure that your **fax numbers** are in **column A** and insert the **column heading 'Fax'** above the numbers. Enter all other company information in the columns next to the fax number and enter their relevant headings. Please note that the column heading 'Fax' can only be used for the first column. If you have 2 fax headings please name the second fax heading different. e.g. FX.
3. **Remove any text or spacing** from the fax number column
 - **Excel Shortcut:** Select the Fax number column and Go: Edit- Find- Find and Replace- select the tab Replace- type a space into 'Find what' and leave 'Replace with' blank. Then click on 'Replace all'.
4. **Remove any commas, hyphens, brackets, apostrophes** etc. from all columns
 - **Excel Shortcut:** Select your columns and Go: Edit- Find- Find and Replace- select the tab Replace- type a comma/hyphen/bracket/etc. into 'Find what' and type a space into 'Replace with'. Then click on 'Replace all'.
5. **Put your fax numbers into international format** and make sure that all numbers include the area code
 - **Excel Shortcut:** Select the fax number column and Go: Format- Cells- Select 'Custom' and replace the General text with "61"0 for Australian numbers or "64"0 for NZ numbers. Then click 'Ok'.

Please note: When sorting data in excel, make sure the whole document is highlighted in order to keep all corresponding data in the same row (all details match original data supplied- i.e. fax number matches address, contact etc)

Below an example of how your list should look:

Fax	Company
61238767821	J Samson
61731527895	Harrison's
61379135884	Bikes R Us

6. **Save and Close** the .csv file

B. Prepare your Fax document

1. Create your **Fax flyer/document** in Microsoft Word
2. The fields being merging must be in ARIAL, FUTURA BK or TIMES NEW ROMAN font (mail merge in other fonts can potentially cause errors), go **Tools > Letters and Mailings > Mail Merge**.
3. On the right hand side of the screen there is a **Mail Merge** menu, click on the bottom step **>Next: Starting document**. Then click on the **>Next: Select recipient's** option. Click **Browse**. Select your appropriate **.CSV File**.
4. Highlight the words/area where you want the merge to take place, then go to your Merge Toolbar (which should appear in your toolbars at the top of your screen- if not go View Toolbars- Merge Toolbar), click the 6th Icon from the left **> Insert Merge Fields**. Click on the appropriate field you want

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to be merged in the area of the document. Click **Insert**. Then follow **Step 4** for each other merge field you would like to insert.

5. Check that you have inserted the correct merge fields by clicking on the 8th Icon from the left of your merge toolbar > **View Merged Data**, then click on the **Blue arrows** to view the document with the merged fields. If all names/contacts etc appear in the document and the size/format etc does not affect the layout of your document then click >**View Merged Data** again to put the Merged document back to the view <Company> for example instead of viewing the actual company name.
6. Once the appropriate fields have been merged and appear when you test them, you can proceed to save the file by >**File, Print**- select your **Linotronic Print driver*** from your Printers drop down menu. Then select >**Print to File**, on the right hand side of your Print Menu. Then click >**OK**. If your Personalised document has multiple pages, you must print each page separately to PRN format. Once the document is saved as a **PRN file**, you can now upload your personalised fax broadcast.

* (If you do not have a Linotronic printer driver installed please download "**Instructions for installing Linotronic printer driver**" from the 'Fax Marketing' page under 'Instructions' tab on our website www.faxem.com.au)

C. Upload your Personalised Fax broadcast



1. Go to www.faxem.com.au, select **Login/Fax Login** from the left hand menu and enter your username and password (You may wish to add this login page to your favourites for quick access in future).
 *If the Login page does not appear, you will need to install the latest version of Java (Instructions are available for download on our website under the menu item 'Instructions/Fax Marketing')
2. If you use multiple services select '**Fax Marketing**' otherwise select '**New job**'
 - **Job Description:** Enter a name for your campaign which allows easy identification for job starting, reporting and billing purposes
 - **Fax page (-s) Postscript File:** Click on 'add' and select the PRN file you wish to send (insertion of multiple files/pages is possible when sending personalized broadcasts however your must have each page printed to PRN separately).
 - **Fax number File:** Click on 'add' and select the Excel CSV file you wish to send.
 - **Personalised:** Please tick this option.
 - **Eliminate double fax numbers:** Leave ticked unless you wish to send to duplicate numbers.
 - **Job Blocklist:** If you have a Blocklist file, please format as in the same way as the Fax database (international format, .csv file etc.) and click on 'choose.' to select the file. If you do not wish to block any numbers leave blank.
 - **Server Blocklist:** Leave ticked, unless the recipients have requested to receive fax information from you.
 - **Fax Headerline:** Type what you would like to appear in the heading of your fax (e.g. your company name)
 ! By selecting 'Edit' you can also insert additional information such as total pages, page number etc. as well as fields from your database to personalise the fax heading free of charge.
 - **FaxID (Number of Sender):** Enter your company's fax number including area code
 - **Fax quality:** Leave as 'Normal' unless you wish to send your broadcast in 'High Resolution', which attracts a 25% price increase
 - **Tariff:** Leave as 'Express'
 - **Starting time:** - To insert the Fax broadcast for the current date + time leave the fields blank
 - To schedule the send for a later date + time please enter date (dd/mm/yyyy) and time (hh/mm) in 24 hour format ! **QLD time**

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- **Resending:** To reattempt any unsuccessful fax numbers after the initial campaign is complete select the 'Express' option under 'Resending'. The system will automatically upload a resend file into the job administration. Simply login and start the resend job from the job administration. If you do not wish to reattempt any unsuccessful numbers please select 'No Resend'.
 - **E-Mail Address for report:** Enter your email address or the email address which you wish the fax report summary to be sent to.
 - **Control Fax:** Enter your fax number in international format (e.g. 61740513399) without any spacing, commas etc. to receive a test fax for your uploaded Fax campaign.
3. Click on '**Accept**' The **Overview Fax Insert** page will appear. If any writing appears in colour this indicates an error has occurred. Please see "Additional Instructions for Personalised/Mail Merge Fax" for troubleshooting or contact our office for assistance.
 4. If there appear to be no errors, double check all details of your Personalised Fax broadcast and click on '**Send**' to continue.
 5. Wait until **100%** of the data is transferred and click on '**OK**'




D. Send your Fax broadcast

Always check your test fax before starting your Fax broadcast!

1. Click on '**Job Administration**'
2. Check all details of the **Test Fax** you have received – If you haven't received the test fax highlight your fax campaign, enter your fax number in international format into 'Controlfax to' and click on 'Send' Instead of sending a test fax to your fax machine you can also **view the test fax online** – simply select your campaign in the job administration and click on 'View'.
3. **To start your Fax campaign** select your job in the job administration and click on '**Start**'. If your send is scheduled for a later date + time the Status will change to 'waiting' and automatically start at the selected date + time.



E. Reports

1. Once the Fax broadcast is completed a **report summary** will be sent to your selected email address.
2. To view and/or download a **detailed report** of your Fax campaign please click on the link next to '**to view your detailed report please go to...**' within your report email or go to our website www.faxem.com.au and select **Login/Fax and SMS Reports** from the left hand menu.
3. Enter your Username + Password and click on '**Login**'
4. Select '**Fax Marketing**' if you use multiple services
5. Select your Fax broadcast and click on 'Get Report' (located at the bottom of the page) or on the following icon 
6. On the next page please select from the given formatting options for your report and click on '**Request report**'
7. Click on '**Open**' or '**Save**' To access additional reports click on 'Back to overview' and proceed as above.

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