toniq retail guides

Client Maintenance & Contacting Clients

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HINTS FOR MOVING AROUND, PRINTING OR VIEWING THIS MANUAL WITH ADOBE

To move to a particular section on this manual simply click on the relevant heading from the Contents table on the next page. *(Press Ctrl and Home together to be returned to the start of this manual.)*

To print this manual (or specific pages) from the top taskbar select File, then Print. Ensure the printer you require is the one listed under Printer Name. In the Page Range section, choose All, Current Page or the Page range you require.

Adobe will normally open pages to be viewed at 154%. If you do not like the size of the pages displayed on the top taskbar click the drop box beside 154% and change to 100% (or the size you require).

Hints, Tips & Handy Info

Refer to another area of this (or alternate) manual

Warning, Important Information & Awareness

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About Contacts and Clients

Having a well maintained database of your regular clients gives you the ability to easily target them for in store promotions, repeat reminders and the like. You must also have a Client entry in your database before you can join a customer to a Club or before a customer can start a Layby.

Adding a Contact / Client

Tip: A form on the counter is a great way to collect client details whilst getting the customers approval for receiving promotional information at the same time. A sample form can be found at the end of this document.

From the *Main Menu* in Retail, choose:

- 1 [POS]
- 1 [POS Selling]
- Then log on (as if making a normal sale)
- F5 [Client]

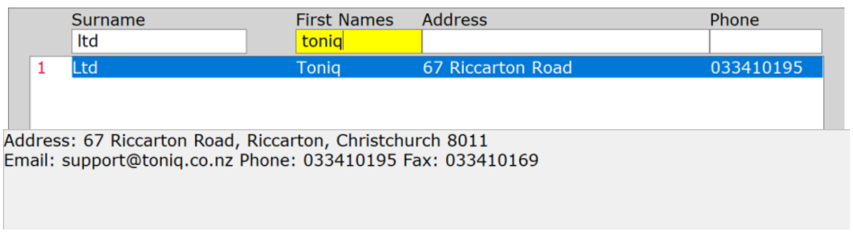
Searches for clients can be performed various ways depending details entered or the placement of the comma
To find the customer press F5 Client first and use one of many search options:

- Typing just Smith finds all clients with Smith as part of surname
- Typing Smith, P finds clients with Smith as part of surname and first name starting with P
- Typing P Smith finds clients with first name starting P and Smith as part of surname,
- Typing S,P finds clients with surname starting with S and first name starting with P.
- Typing 3338 finds all clients with 338 in their phone or mobile number field
- Typing smith@ finds all clients with smith@ in their email address field

- You can also toggle contact details when a list of potential matches has been found by using the F4 Toggle email (which toggles between address and email) and F5 Toggle Mobile (which toggles between phone or mobile)

- Check whether they are already an existing Client by reviewing the list displayed. If they <u>are</u> on your list make the appropriate selection by keying in the corresponding number displayed on the left hand side of the list or by highlighting the Clients name and <Enter>.

If there are more than 9 names displayed press Page Down to continue reviewing client names before making your selection. Whilst moving down the list of customers additional client details will be displayed at the bottom of the screen to assist with selecting the right customer. CORPORATE USERS – if this is a Corporate customer their First and Surname names will be displayed in purple and the client details box will be pale blue.



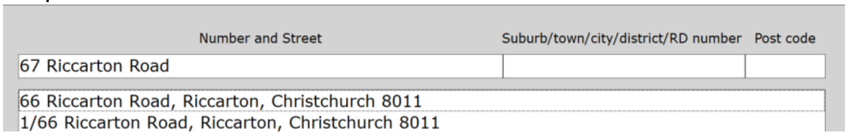
Tip: If there are several customers with the same surname, you may choose to type the Clients first name (or part thereof) into the 'First Names' field and then select from the list accordingly once found

Whilst moving down the displayed list of customers additional client details will be displayed at the bottom of the screen to assist with selecting the right customer. CORPORATE USERS – if this is a Corporate customer their First and Surname names will be displayed in purple and the client details box will be pale blue.

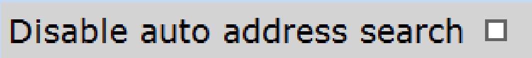
- If the customer does not appear to be on the list F7 [Show hidden] and review the list again

- If the customer STILL does not appear F3 [Add New Client]
- Fill your clients information in the desired fields. This will normally be most of the details under the General Details section

- When you enter some details into the first Address line and press Enter you will be presented with matches to the NZ Post Address file. Select the correct record. If the correct record is not found but there is one very close select this – the street number entered by you will be retained but the other details will be updated.



If you don't like this 'auto search' function it can be turned off. Go to 7 [Administration], 1[Setup], 8 [General option]. Tick Disable auto address search to turn the function off and F12 Accept Details. NB: turning off this option turns it off for Clients, Club and Debtor addresses



- You can use the Address Lookup function to assist with spelling and consistency (and to improve your current records. With at least some information in the first Address line of the Client record press F7 [Lookup Address] and a list of addresses will be displayed to select from
  Reducing / limiting the initial Address data entered may increase the number of matches displayed.

- Once selected the details will be added to the client record and the cursor will be positioned in the Email field – ready for email address entry

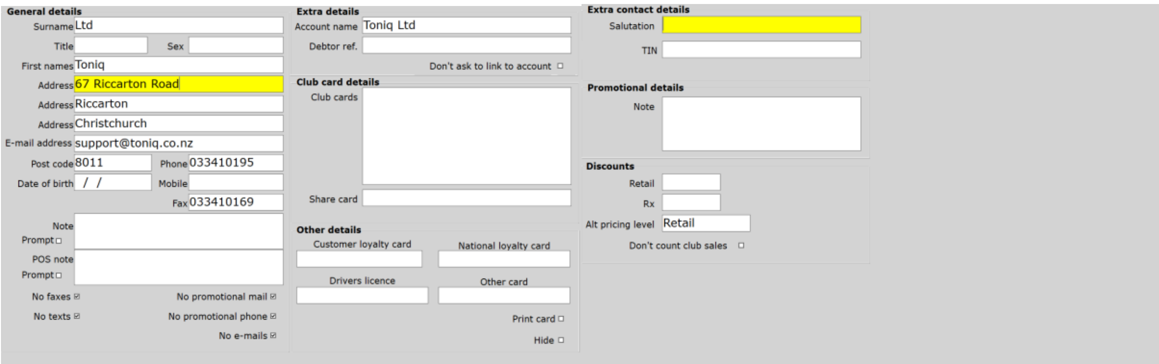
- Tick or untick the No Promotional flags according to customer's preference. These, by default, are set to ***NO*** - *how these options are set can impact on which clients are selected when using Maintain Contacts in Bulk.*

- *Many pharmacies like to record Drivers Licence details when selling certain products (e.g. pseudoephedrine).* Highlight the *Drivers Licence* field and "scan in" the barcode on the customer's licence (The **DL** indicator appears when the client is selected at the POS screen, to indicate the client record has this information), and the licence number will automatically print on the Transaction Audit report (if the '*Show Client Details'* option is ticked on p2.)

- F11 to move to page 2

- You can set up automatic Discounting for this client on this page. Simply go to the Discounts section and key in the required discount percentages for each item type (ie Retail and RX can have different discount percentages). (When this client is recalled at POS, the seller will be advised on the discounts and can confirm or decline their use)

- F11 to go back to page 1 and then F12 to [Accept details]



Tip: It is advisable to ask the customer whether they would like to receive Promotional information and the means by which they would like to receive it (ie Fax, Email, Text, Phone). Do not un-tick the promotional fields unless you have asked the customer first about receiving promotional information. ***A form on the counter is a great way to collect this information whilst getting the customers approval at the same time. A sample form can be found at the end of this document.***
(This form can also be found in C:\Program Files\Dispensary\Manuals\A5 2 x A6 Patient Contact Consent Form)

Maintaining an existing Contact / Client

From the *Main Menu* in Retail, choose:

- 1 [POS]
- 1 [POS Selling]
- Then log on (as if making a normal sale)
- F5 [Client]

ALTERNATIVELY from the *Main Menu* in Retail, choose:

- 4 [Contacts/Clients]
- 1 [Quick Contact Clients]

THEN (AFTER USING ONE OF THE OPTIONS ABOVE)

- Start typing in the customers surname (or part thereof) and <Enter> or use one of the search options detailed on page 4
- Review the list displayed and make the appropriate selection by keying in the corresponding number displayed on the left hand side of the list or by highlighting the Clients name and <Enter>

If there are several customers with the same surname, you may choose to type the Clients first name (or part thereof) into the 'First Names' field and then select from the list accordingly when found.
Or if the customer does not appear to be on the list press F7 [Show hidden] and review the list again. If there are more than 9 names displayed press Page Down to continue reviewing client names before making your selection. Whilst moving down the list of customers additional client details will be displayed at the bottom of the screen to assist with selecting the right customer. CORPORATE USERS – if this is a Corporate customer their First and Surname names will be displayed in purple and the client details box will be pale blue.

- If you have gone in through Quick Contact Clients, arrow down or click once on the Clients name

- F2 [Edit Client]
- Make the required changes on Page 1 and Page 2, by pressing the F11 key to move between pages

If the Address line 'header' fields are red when reviewing an existing client this indicates that this address has not been 'verified'. With at least some information in the first Address line of the Client record press F7 [Lookup Address] and a list of addresses will be displayed to select from.
Reducing / limiting the initial Address data entered may increase the number of matches displayed

Address 33 Whaui Street

If you don't like this 'verification reminder' function it can be turned off. This is linked to the auto search function. Go to 7 [Administration], 1[Setup], 8 [General option]. Tick Disable auto address search to turn the function off and F12 Accept Details

Disable auto address search ☐

- Once back at Page 1 (General Details page), F12 [Accept Changes]

If address or promotional flag changes are made (and the client has a Debtor Account or Club Card) you will be prompted whether you want these to be copied to the Clients Club Cards, Debtor Account or Both

Auditing & tracking of Contact / Client changes

In version 5.1 a client audit log was added to the program. Edits, LTC and Merges are amongst the changes tracked and changes in both Retail and Dispensary are recorded. To review changes made since this time recall and edit a client record in one of the normal methods (eg F5 Client (to recall) then F2 Edit Client).

Then press F10 [Other], A [Audit Log].

As each entry is highlighted (arrow up or down) details about the actual changes made will be shown at the bottom of the screen.

Audit Log: Toniq Ltd
Added on: 07/01/19 10:36

Date Time	Program	Workstation	Type	Staff
07/01/19 10:44	Retail	ISAACS	Edit	TQ
07/01/19 10:43	Retail	ISAACS	Edit	TQ

Changes made on 07/01/19 10:44
Address 3 changed from "New Zealand" to "Christchurch"
Address has been validated

Changes made via Maintain Contacts in Bulk or from the Dispensary program are also 'logged'.

Audit Log: Toniq Ltd
Added on: 07/01/19 10:36

Date Time	Program	Workstation	Type	Staff
07/01/19 10:47	Dispensary		Merge	TQ

Changes made on 07/01/19 10:47
Customer merge : source customer , 129 Maxell Crescent, Cawdor

Changes specific to Toniq Dispensary have been made. Use Toniq Dispensary to view details

Creating a Contacts List

Short List
To make a short list of recipients, use the **Quick Contacts** option

- 4 [Contacts/Clients]
- 1 [Quick Contacts Clients])

- Start typing in the customers surname (or part thereof)

- Review the list displayed and make the appropriate selection by keying in the corresponding number displayed on the left hand side of the list or by highlighting the Clients name and <Enter>

If the customer does not appear to be on the list press F7 [Show hidden] and review the list again. If there are more than 9 names displayed press Page Down to continue reviewing client names before making your selection. Whilst moving down the list of customers additional client details will be displayed at the bottom of the screen to assist with selecting the right customer. CORPORATE USERS – if this is a Corporate customer their First and Surname names will be displayed in purple and the client details box will be pale blue.

- To add additional clients, start typing in the customers **surname** (or part thereof) into the 'Select Client' field and <Enter>

Again review the list displayed and make the appropriate selection by keying in the corresponding number displayed on the left hand side of the list or by highlighting the Clients name and <Enter>

- Continue to do the above steps until you have the total list of Clients / Contacts you require

- Once you have all your desired Clients on the list, click once in the 'Contacts List Name' field and give it an appropriate name. Choose something simple to make the list easy to identify (ie Summer Promotions)

- F12 [Accept Details]

Large List
- Alternatively you can use Maintain Contacts in Bulk (see Using Maintain Contacts in Bulk section below), setting a criteria to call up the clients you require

- Once you have chosen your criteria F12 [Accept Details] (to generate your list)

- F9 [Contact Clients]

- Type a name for your Contacts List into the Contact List Name field.

- F12 [Accept Details] twice and Y [Yes] to the 'Change Clients' prompt.

Adding to existing Contacts List

- 4 [Contacts/Clients], 3 [Maintain Contacts List]
- In the blank field <Enter> and select the List name that you wish to add new contacts to
- Go to the ‘Select Client/Staff’ field
- Start typing in the customers surname (or part thereof) and <Enter>
- Review the list displayed and make the appropriate selection by keying in the corresponding number displayed on the left hand side of the list or by highlighting the Clients name and <Enter>

If the customer does not appear to be on the list press F7 [Show hidden] and review the list again. If there are more than 9 names displayed press Page Down to continue reviewing client names before making your selection. Whilst moving down the list of customers additional client details will be displayed at the bottom of the screen to assist with selecting the right customer. CORPORATE USERS – if this is a Corporate customer their First and Surname names will be displayed in purple and the client details box will be pale blue.

- To add additional clients, start typing in the customers **surname** (or part thereof) into the ‘Select Client’ field and <Enter>

Again review the list displayed and make the appropriate selection by keying in the corresponding number displayed on the left hand side of the list or by highlighting the Clients name and <Enter>

Continue to do the above steps until you have added the additional Clients / Contacts you require.

- F12 [Accept Details]

Using Maintain Contacts in Bulk

Maintain/Contact Clients in Bulk is full of features to help you target the right people for your promotions, department sales, let them know what's happening in your store or simply to wish them a Happy Birthday.

Some common uses are:

- Finding clients who have purchased a particular product
- Finding clients who have spent over a particular amount in store
- Finding clients with birthdays in a particular month
- Finding clients who have a mobile or email address for text/email promotions / reminders
- Removing the No Promotional Mail flags before sending emails or texts

Once you have generated your list of selected clients you can then proceed to edit their details in bulk, Setting Notes, a common debtor account, Retail Discount or RX Discount, Promotional Information flags or Print Lists, Labels or send emails/texts.

- 4 [Contacts/Clients], 4 [Maintain/Contact Clients in Bulk]

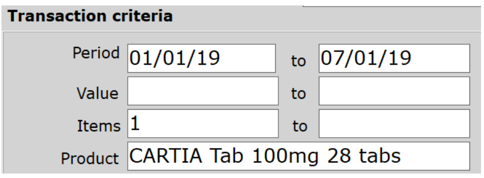
- If you want to use this set of 'selection criteria' in the future type a recognisable name into the "Criteria Name" field. (NB: All settings will be retained including the last period you entered when using this saved criteria.)

- Round up recipients based on desired selection criteria.

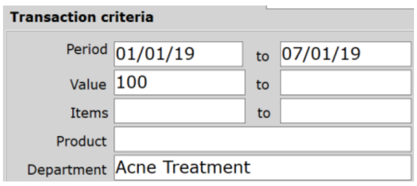
There are 2 main types of selection criteria, Transaction or Client.

- Via the left hand side of the screen you can generate lists based on **Transaction criteria** (client sales history).

The example below will produce clients who have purchased at least 1 Alanase Spray between the period of 01/05/12 and 25/09/12.

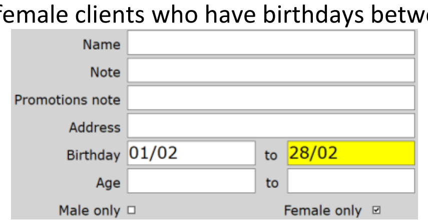


The example below will produce clients who have spent at least $100 on Clinicians Vitamins between the period of 01/05/12 and 25/09/12.



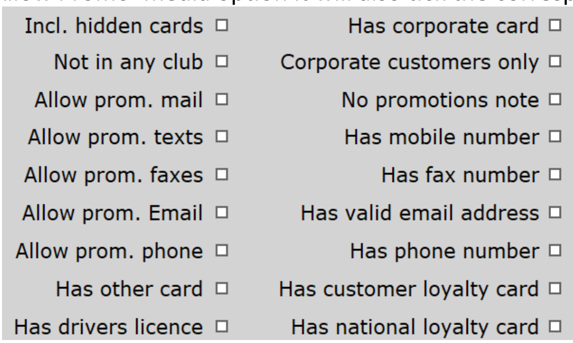
- Via the right hand side of the screen you can generate lists based on **Client criteria** (personal client information).

The example below will produce a list of female clients who have birthdays between 1 February and 28 February.

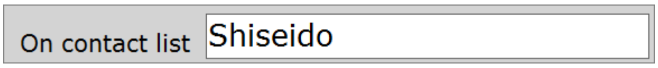


- Depending on your promotion or target market and also how you plan to forward your promotional information to these clients, you may also choose to tick ‘Has valid email’, ‘Has mobile’, ‘Has customer loyalty card’ or select a Club.

NB: by default if you tick an ‘Allow Promo’ media option it will also tick the corresponding ‘Has’ filter.



- You can also recall all Clients in a particular club (spacebar within the In Club field (on page 1) or all clients on a previously created Contacts List (spacebar and Enter within the On Contacts List fields (F11, on page 2) and select from the available lists.



And more options on page 2 [F11 Next Page] include:

- customers who receive an alternative pricing structure. <Spacebar> and select the alternative pricing you wish to recall.
- choose to ‘Include Deceased’ or display ‘Only Deceased’
- clients who get Retail or Discount discount via their Client record settings
- find all clients linked to a particular Debtor account. Type in part of the account name, <Enter> and select the required Debtor Account.
- Find all clients from a particular ISP email provided - type (eg) @xtra into the Email address field
- Clients who last received an email or text on a particular date – set this in the Email / Text Send date fields

You can select any options from either or both sides of the screen (and the alt pricing options) to produce a really specific list of criteria.

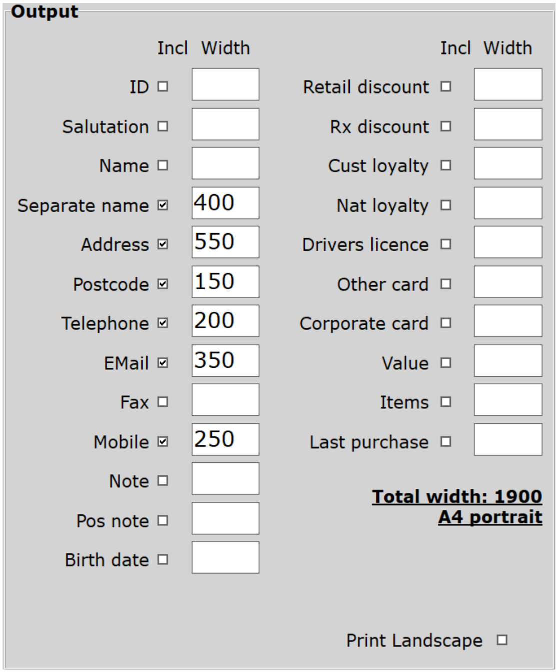
What information to Output for Printing or file Export?

- F11 [Next Page] so you can choose what information will appear on the Print List or will be exported to file.

You may choose not to change any of the settings on this page but if your report is missing information you require check this page to see if the appropriate option is available to print/export.

> Tip: If you change any fields you will need to enter a width for each required field in order for the selected topic to appear on the Print List. Check that your TOTAL widths do not exceed the following otherwise your requested data will not fit on your page. Standard paper widths: A4 – Portrait 1950, Landscape 2800, A5 – Portrait 1350, Landscape 2000

You have the choice of selecting the following options to appear on print outs and exported data.
(Toniq default fields are prefilled – as in the example)



"Name" shows the clients title, first name and surname in one line during export. "Separate name" separates out the clients title, first name and surname into individual fields during export, keeping it a good option for mail merges

NB: Last Purchase Date will only export if used in conjunction with a Transaction Criteria Period and Value or Item on page 1

(Press the F1 Help key for suggested field widths)

Print Landscape: You can choose to tick this option to print your list landscape, providing more space to print your requested fields across the page. This is a good idea if you have chosen to print Note or POS Notes. You will need to have a landscape driver configured in Windows and a Landscape printer assigned in Device Setup.

- When you have finished selecting your output fields F11 [Next Page] to return to the first page

- Once you have selected all the required criteria, F12 [Accept Details].

Once a selection of clients has been made, you can now do a variety of things to and with this list.

F2 [Edit List]

This will allow you to A [Add more clients] by selecting a new set of criteria, R [Remove clients] by selecting a different set of criteria, or E [Edit List Customer by Customer] to add, remove or make changes to individual customers as required

F3 [Sort]

The list can be sorted *alphabetically* (by surname) or *address* (useful if you only want to make one contact per household). It can also be sorted by **transactional** *$ Value* or *Items Bought* – meaning you can target your top customers. *(NB: this is not club spend)*

F4 [Set Other]

For setting a common debtor account, setting Retail or RX discounts and Alternate Pricing (press the spacebar after choosing this option to select).
Within this option you can Append or Clear POS or Client notes for all the listed clients, Set the Print Card option, and Set/Unset POS Note and Note prompts. (See section on Notes and POS notes). You can also set the 'Dont Count Sales' flag on the CLIENT (not club card) records.

F5 [Set Corprt]

This option is only available for Corporate customers. For more information please contact Toniq

F6 [Set Prmotn]

You can change Client Promotional Information details. Within this option you can Append or Clear the Promotional Notes field, and can also **Unset and Set the Promotional media flags**. There is also the option to join customers in bulk to another club. *(NB: settings in this field affect CLIENT records, not club card records)*

F7 [Print List]

This will allow you to print the list to hard copy on the printer selected (by pressing F12) or export to a PDF (F4), CSV (F5) or txt (F7) file format. This report or export will show the client's *Name*, *Address*, *Phone*, *Cellphone* and *Email address.* You can limit the number of clients printed on the list by changing the number in the 'Select number of customers' field when presented. If you select 20 it will print the top 20 from your list.
NB: You can change the output by selecting output fields before creating bulk list on Page 2 of selection criteria. See previous page of this document for more details.

F8 [Print Labels]

When printing mailing labels you will be presented with 4 choices. Options to 'Print All', 'Select beginning client, 'Print selected and following' and 'Print First ….' (ie 100 prints the first 100 clients from your list)

(NB: If you are using options 2 "Select beginning client" AND you are reviewing a PARTICULAR selection of clients only, ensure you do select a member from THAT particular selection as your beginning client)
(NB: If you are using option 3 "Print Selected and following" YOU MUST have highlighted the starting customer FIRST, PRIOR to selecting this option. This is normally used to reprint in case of a printer error)

> With most printing options you will be prompted for the number of labels you want to print, which defaults to the number of customers listed AFTER your starting point and can be changed (ie if you want to print in blocks of 50). You will also be prompted for the starting positions on your label sheet, to avoid wastage.

F9 [Contact Clients]

Use this option to contact clients via Email or Text. See the following Text/Email section
This option can also be used to SAVE this generated list of clients as a Contacts List or a template for recalling later. F9 [Contact Clients], type a name into the Contact List Name field, F12 [Accept Details] twice and then Y [Yes].

Printing Address Labels

Printing Address Labels for Clients can be done from numerous places in the Retail program, and can be done individually and in bulk.

Your label type must be set up correctly PRIOR to attempting to print your first label.

Choices for printing address labels are:

- Print onto the large part of a ***Dispensary label***, using an Eltron-style printer
  (Handy for small runs, easy to setup, expensive in label costs for large runs)

- Print onto ***A4 sheets*** of ready-made sticky address labels (eg. Avery labels), using a laser or inkjet printer
  (Good for large runs, cheaper in label costs, usually some trial and error getting alignment correct between print and label)

Mail label settings within Retail are *individual* to each computer. If you have previously printed mail labels from the computer you are using, the setup will already have been completed and you can probably skip the Printer Options and Setup section below. For untested situations, please follow the guidelines below (or recreate the settings from a computer that you know prints labels correctly)

Printer Options and Setup

To check or change your mail label setup

- 7 [Administration], 1 [Setup], 2 [Workstation Configuration], 1 [Devices Setup]

For Printing onto the large part of a Dispensary label:

- Set a dispensary label printer to be your address label printer
- Set the **Left = 160**, **Top=90**, **Width=700**, **Height=610** (or similar settings). The choice of font and font size is less relevant, but a size of 14 gives a readable print.

Mail label	\\davids\ZDesigner LP 284	160	90	700	610		12

- F11 [Next Page]. Set the **Columns=1** and **Rows=1** for labels.

	Cols	Rows
Card	0	0
Label	1	1

- F11 [Next page], then F12 [Accept Details]

For Printing onto A4 sheets of ready made adhesive address labels (eg Avery labels)

- Set an A4 printer to be your address label printer
- Set the **Left = 0**, **Top=0**, **Width=2100**, **Height=2970** (the size of an A4 sheet). The choice of font size is important – a figure of 8 is small enough to fit most labels.

Card		0	0	0	0		0
Mail label	Brother MFC-J5720DW Pr	0	0	2100	2970		8

- F11 [Next Page]. Set the **Columns=6** and **Rows=10** for a sheet of labels with 6 across and 10 down. Modify these settings appropriately if you have a different label configuration on your sheets.

	Cols	Rows
Card	0	0
Label	6	10

- F11 [Next page], then F12 [Accept Details]

There will always be a certain amount of <u>trial and error</u> in getting the address aligned to the labels. It is <u>cheaper</u> to test your printer settings by using a sheet of <u>plain</u> A4 paper instead of a sheet of labels (and then holding both sheets up to a window to see if they align).

It is also <u>easier</u> to test your printer settings by selecting <u>any</u> clients – rather than spending time manipulating your database to select the ones you really want. When you're happy that your labels will print correctly, <u>then</u> insert your label paper and select exactly which clients you want labels for.

Printing Individual Labels

From the POS Selling screen

- 1 [POS], 1 [POS Selling], then log on
- F5 [Client]
- Start typing in the customers surname (or part thereof) and <Enter>
- Review the list displayed and make the appropriate selection by keying in the corresponding number displayed on the left hand side of the list or by highlighting the Clients name and <Enter>
- *(If the customer does not appear to be on the list F7 [Show Hidden] and review the list again)*

- F10 [Other]
- **P** [Print Address Label]
- Select the appropriate Start Column and Row positions and press F12 [Accept Details]
- *NB: If the P [Print Label] option is not available under F10 [Other], <Esc> once, F5 [Client] again and then F10 [Other] again*

From the Edit Client screen

- 1 [POS], 1 [POS Selling],
- F5 [Client]
- Start typing in the customers surname (or part thereof) and <Enter>
- Review the list displayed and make the appropriate selection by keying in the corresponding number displayed on the left hand side of the list or by highlighting the Clients name and <Enter>
- *(If the customer does not appear to be on the list press F7 [Show hidden] and review the list again)*

- F2 [Edit Client], F6 [Print Label]
- Select the appropriate Start Column and Row positions and F12 [Accept Details]

From the Quick Contact Client screen

- 4 [Contacts / Clients], 1 [Quick Contact Clients]
- Start typing in the customers surname (or part thereof)
- Review the list displayed and make the appropriate selection by keying in the corresponding number displayed on the left hand side of the list or by highlighting the Clients name and <Enter>
- *(If the customer does not appear to be on the list F7 [Show Hidden] and review the list again)*

- Go down and highlight the customer from the display field
- F2 [Edit Client]
- F6 [Print Label]
- Select the appropriate Start Column and Row positions and F12 [Accept Details]

Printing Bulk Labels

- 4 [Contacts/Clients], 4 [Maintain / Contact Clients in Bulk]
- Choose your selection criteria *(for more details see the Maintain Contacts in Bulk section of this manual)*
- F12 [Accept Details]

- Once report is generated F8 [Print Labels]

- You will be presented with 4 choices. Options to 'Print All', 'Select beginning client, 'Print selected and following' and 'Print First ….' (ie 100 prints the first 100 clients from your list)

(NB: If you are using options 2 "Select beginning client" AND you are reviewing a PARTICULAR selection of clients only, ensure you do select a member from THAT particular selection as your beginning client)

(NB: If you are using option 3 "Print Selected and following" YOU MUST have highlighted the starting customer FIRST, PRIOR to selecting this option. This is normally used to reprint in case of a printer error)

- With most printing options you will be prompted for the number of labels you want to print, which defaults to the number of customers listed AFTER your starting point and can be changed (ie if you want to print in blocks of 50).

- You will also be prompted for the starting positions on your label sheet, to avoid wastage. Press F12 to Accept Details

Printing Customer Cards

Menu Item

This option is mainly used to print a Customer Card with a barcode, which can then be laminated, given to customers and presented when they are buying products. The card is scanned at the POS Selling screen and means that you do not need to press F5 Client and search for the client, saving quite a lot of time.

Some pharmacies have sheets of A4 card pre-printed on one side with the pharmacy name/logo to fit a 3x6 format. The customers' name and barcode is then printed on to the reverse side.

Other pharmacies print onto a Dispensary label and place this sticker onto the reverse of the logoed sheet.

Printer Setup - one time only (on each computer you want to print from)

- 7 [Administration], 1 [Setup], 2 [Workstation Configuration], 1 [Devices Setup]

Printer Setup -

- If using A4sheets, press the spacebar in the "Card" printer and select an A4 laser printer. Set the Width:2000 and Height:2800. Pick a Font and Font Size.

- If using Dispensary labels, press the spacebar in the "Card" printer and select the printer with dispensary labels loaded. Put in the settings that you have for your dispensary labels. These may be something like Left:160, Top:0, Width:700 and Height:630. Pick a Font and Font Size.

Card	Brother MFC-J5720DW Pr	0	0	2000	2800	Times New Roman	14
Mail label	\\davids\ZDesigner LP 28	160	0	700	630	Times New Roman	12

- F11 [Next Page]

Customer Card/Label Settings

- If using A4sheets, printing 18 customer club cards with 3 columns and 6 rows, you would set Card Cols to 3, Card Rows to 6. (These figures can be changed depending on the number of columns and rows required)

- If using Dispensary labels, set the Card Cols to 1 and Card Rows to 1

- You must also set the Card Name and Card Barcode measurements

Customer card/label settings

	Cols	Rows		
Card	3	6		
Label	1	1		
	Left	Top	Width	Height
Card name	0	0	500	200
Card barcode	0	200	500	100

- F11 [Next Page], F12 [Accept Details]

Printing Cards

To prepare a card for a customer

- 1 [POS], 1 [POS selling screen]
- F5 [Client], find your client, F2 [Edit Client]
- Put a tick in the Print Card box
- F12 [Accept Details]

This is normally done at the time of adding the Client to the database or when adding their discount percentage. When you go to the Print Customer Card screen (later) these customers will all be there on your list.

Alternatively you can use Maintain Contact in Bulk to recall all or certain customers and **set** the Print Card option in bulk (this does NOT print the cards at this time)

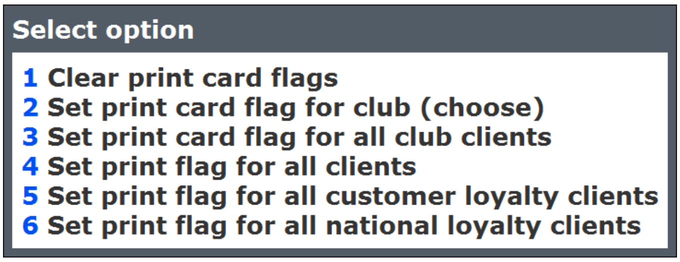
- 4 [Contacts/Clients], 4 [Maintain/Contact Clients in Bulk
- Round up recipients based on desired selection criteria. For example ie all clients that have made a purchase during a certain period and from a particular Department or Catalogue, or all customers with a Retail discount (by ticking the 'Gets retail discount' box), or all customers in a particular Club by using the In Club field.
- F12 [Accept Details] to generate the list.

- F4 [Set Other]
- 9 [Set/Unset Print Card], tick Set
- F12 [Accept Details] TWICE and Y [Yes] to the change prompt.

Another alternative is if you want to print cards for ALL clients or Clients meeting a particular criteria

- 6 [Reports], 3 [Client Reports], 1 [Print Customer Cards].
- F10 [Other].
  - 2 [Set for club] and choose the club in question
  - 3 [Set for ALL club clients]
  - 4 [Set Print Flag for ALL clients]
  - 5 [Set flag for all customers with a Loyalty number] on their record
  - 6 [Set flag for all customers with a National loyalty number] on their record

- F12 [Accept] now to just SET the flags or F9 [Print] to set and print (see below)



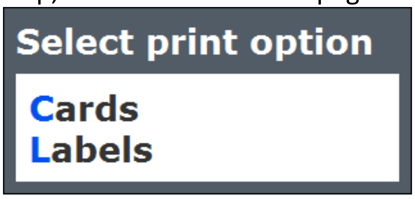
Now you are ready to print a run of cards

- 6 [Reports], 3 [Client Reports], 1 [Print Customer Cards]

Client Name	Address
Attloy J	30 Chapel Street Cawdor
Audos, Miss J	26 Blackfriars Street Dyce
Avartan K	185 Union Street Dyce
Avins, Mrs S	158 Morningside Drive Dundee
Avury J	182 Union Crescent Inverness
Bachlir, Mrs S	195 Willowbank Terrace Dyce
Baddueha, Mr B	74 Blackfriars Place Ullapool
Baernu, Miss K	113 Morningside Street Dunbar
Baettau K	101 Chapel Crescent Inverness

You will be presented with the list of cards currently ready for printing

- F9 [Print] and choose either
    - Cards, in the format specified above (ie A4 3x6 or dispensary label size) with their name and barcode OR
    - Labels (this is Mail Labels (with postal address details) which must have been set up previously in Device Setup, Mail Labels field and page 2 Label Columns/Rows)



Once you have successfully printed your cards (and/or labels)

- F10 [Other], then 1 [Clear print card flags] to clear the Print Card flag from all these clients.
- F12 [Accept Details] when finished

Using Notes and POS Notes

Notes and POS Notes give you the ability to add and display notes on an individual or numerous client/patient accounts.

- **NOTES** will be displayed in the Client record in Retail and in the Patient notes in Dispensary and can be altered by Editing the Patient/Client in either programme. (This is a shared notes field)
- **POS NOTES** are displayed in the Client record in Retail only.

Notes are displayed in a grey box on the left hand side of the clients details, POS Notes are displayed in a grey box in the middle of the client details, when you recall the client in Retail,

Notes and POS Notes can be added and removed individually or in bulk. You also have the option to add a Read - Yes prompt to which your staff must confirm that they have read the message displayed.

Adding or removing notes on an Individual Account

- 1 [POS], 1 [POS Selling]
- F5 [Client]

OR ALTERNATIVELY

- 4 [Contacts/Clients], 1 [Quick Contact Clients/Patient]

THEN (AFTER USING ONE OF THE OPTIONS ABOVE)

- Start typing in the customers surname (or part thereof) and <Enter> or use one of the search options listed on page 4
- Review the list displayed and make the appropriate selection by keying in the corresponding number displayed on the left hand side of the list or by highlighting the Clients name and <Enter>
- *(If the customer does not appear to be on the list F7 [Show Hidden] and review the list again)*
- (if you have gone in through Quick Contact Clients, arrow down or click once on the Clients name)

- F2 [Edit Client/Patient] (if you have gone in through Quick Contact Clients F11 [Next Page])

- To add a Note, F7 [Goto Notes], or simply click inside the Note field. Type in the note that you wish to appear
- Tick the Prompt box if you want to ensure Staff are reading the notes, as they must confirm so during the sale

- In Retail - To add a POS Note, simply click inside the POS Note field. Type in the note that you wish to appear
- Tick the Prompt box if you want to ensure Staff are reading the notes, as they must confirm so during the sale

- Make any other required changes on Page 1 and Page 2, by pressing the F11 key to move between pages

- Once back at Page 1 (General Details page), F12 [Accept Changes]

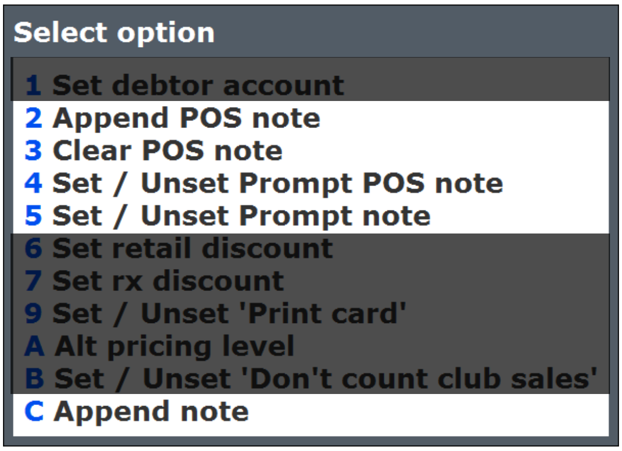
NB: Notes and POS Notes can be added when initially setting up a new Client.

<u>Adding (appending) or removing POS and Client notes in bulk</u>

- 4 [Contacts/Clients]
- 4 [Maintain / Contact Clients in Bulk]
- Define your selection criteria *(for more details see the Maintain Contacts in Bulk section of this manual)*
- F12 [Accept Details]

- Once your bulk client list is generated F4 [Set Other]

- Now make your selection
  2 - to append to a **POS Note**, this new note is <u>added</u> to the end of any existing POS note
  3 - to Clear a POS note
  4 - to Set or Unset the Prompt POS Note option
  5 – to Set or Unset the Prompt (Client) Note option
  C – to append to a **Client Note**, this new note is <u>added</u> to the end of any existing Client note



NB: *When using the 'Append' options (2 or C) text will append **directly** onto the current text so remember to add a couple of space before you start typing the new information. If you want to display your extra text on a **new** line press Ctrl + Enter together before typing the additional text.*

- Once you are happy with your changes, F12 [Accept Details] twice and then Y [Yes] to confirm changes

Text / Email messages to Clients

- **Do you contact your customers about promotions or specials ?**
- **Do you spend time phoning them or preparing ‘mail-outs’ ?**
- **Do you like the idea of quickly emailing or texting them instead ?**

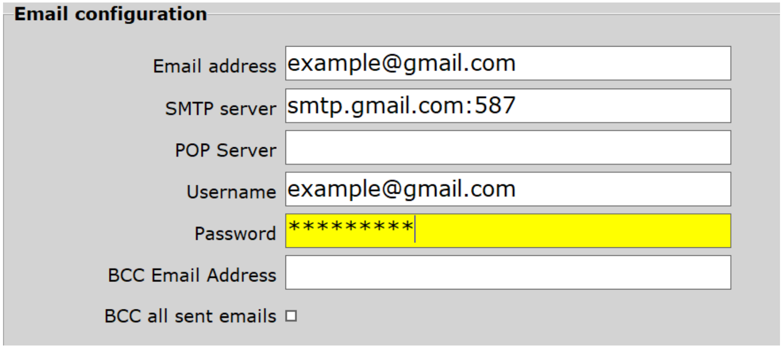
You may choose to contact them, either on an individual basis or *in bulk* depending on their shopping habits, type of items purchased. In addition to the usual ability to print mailing labels, you can now send text messages and email your clients too.

You must be setup with Toniq prior to utilising the Texting functionality. Please contact Toniq today to register your interest and we will set up the external texting links for you.

Setting up for Text / Email Services – Initial one-off setup

Check that email details are correct or set up a new.

- 7 [Administration], 1 [Setup], 7 [Store Setup], 2 [Email Setup], select from the list or F3 [Add]

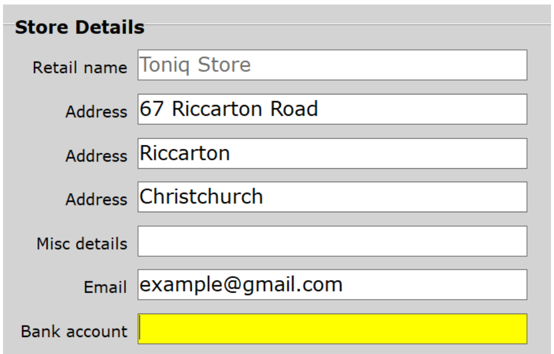


NOTE: *If you don’t have the above information, please contact your email provider.*

- Once information is entered press F12 [Accept Details]

Ensure your e-mail address is entered in the Email address field, under User Details

- 7 [Administration], 1 [Setup], 7 [Store Setup], 1 [Store Setup]



- F12 [Accept Details]

Selecting Your Clients to Send Text/Emails to

We recommend sending a text or email message to yourself or a member of staff to test that the function is working, before spending a lot of time and effort creating your list and message

NB: Clients' cellphone numbers and e-mail addresses will need to be entered into your database prior to using this functionality. **You will also need to remember to clear the No Promotional Info boxes if the client consents to receiving your promotional information BEFORE creating your message**
(see Maintain Contacts / Clients and Maintain Contacts in Bulk sections above for more detailed instructions).

Contacts marked as No Texts cannot be sent text messages. These contact clients are automatically skipped when messages are sent.

Single Client selected from POS Selling

- 1 [POS] 1 [POS Selling]
- F5 [Client]
- Start typing in the customers surname (or part thereof) and <Enter>
- Review the list supplied and make the appropriate selection by keying in the corresponding number displayed on the left hand side of the list or by highlighting the Clients name and <Enter>
- F10 [Other], then Q [Quick contact client]
- Now continue to "Preparing Your Message" section (two pages over left)

Multiple clients selected using the Quick Contact option *(good for a short list of clients)*

- 4 [Contacts/Clients], 1 [Quick Contacts Clients]

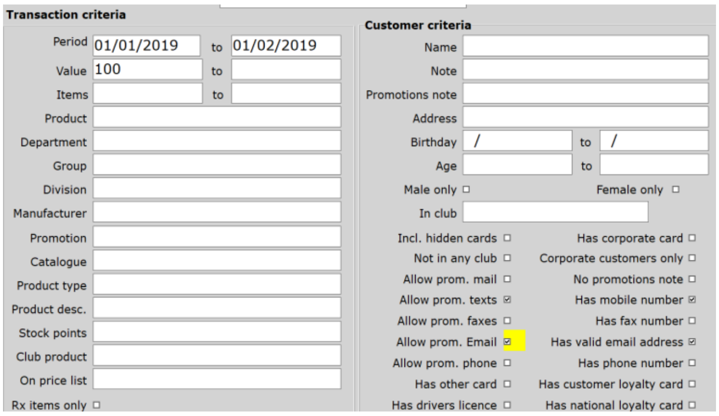
- Start typing in the customers surname (or part thereof) and <Enter>
- Review the list supplied and make the appropriate selection by keying in the corresponding number displayed on the left hand side of the list or by highlighting the Clients name and <Enter>
- *(If the customer does not appear to be on the list F7 [Show Hidden] and review the list again)*
- To add additional clients, Start typing in the customers surname (or part thereof) into the 'Select Client' field and <Enter>
- Review the list supplied and make the appropriate selection by keying in the corresponding number displayed on the left hand side of the list or by highlighting the Clients name and <Enter>
- Continue to do the above steps until you have the list of Clients / Contacts required
- Now continue to "Preparing Your Message" section (two pages over left)

Large list of clients selected using Contact Clients in Bulk

- 4 [Contacts/Clients], 4 [Maintain/Contact Clients in Bulk] to create a recipient list based on selection criteria. (For more information see Maintain/Contact Clients in Bulk section above).

- Remember to tick Has Email Address, Has Mobile Number or Both
  (this will limit the report to only those you can text or email to, without having to bulk edit the resulting report).

- F12 [Accept] to create the list



Once a selection of clients has been made, you can now do a variety of things to, and with, this list. (For more information see the previous Maintain/Contact Clients in Bulk section)

***REMEMBER:* You will need to have cleared the No Promotional Info boxes BEFORE creating and sending your message.** (see Maintain Contacts / Clients and Maintain Contacts in Bulk sections above for more detailed instructions).

TIP: *You can use a Contacts List that you have already previously created. To use this simply go into Contacts/Clients, Maintain Contact List. In the blank field, <Enter>. Select the List name that you wish to use and <Enter>*

Your promotional mailing list will now be displayed – ready to "prepare your message".

Preparing Your Message

- F9 [Contact Clients]

To remove a 'block' of clients from the list highlight the first client, hold down the Shift key on the keyboard and mouse click the last client in the block. Then click F3 [Remove Selected]

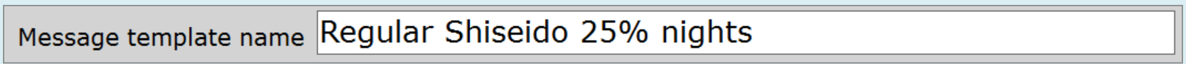
- F7 [Create message]

Remember to maintain your patients' privacy at all times

Avoid giving out personal information and medicine details, as the intended person may not be the final recipient. (eg Mrs Jones gives her cellphone to her daughters when they go out)

CREATING TEMPLATES:

If creating a message that you may want to **USE AGAIN** create and save it as a **TEMPLATE**: F5 Tmplt, C Create/Maintain, press spacebar to check for a current one then (if not found) F3 [Add]. Give it a Message template name and then continue to add the message content as below. F12 [Accept] then Escape once created and it will now be available for selection (through F5 Tmplt, U Use Template, spacebar to select)



TXT messages: are limited to 459 characters (3 multi-part messages) – including your pharmacy name and OPTOUT message **"To stop msgs, Reply OPTOUT"** appended to all Promotional text communication to assist with NZ Anti-Spam Law.

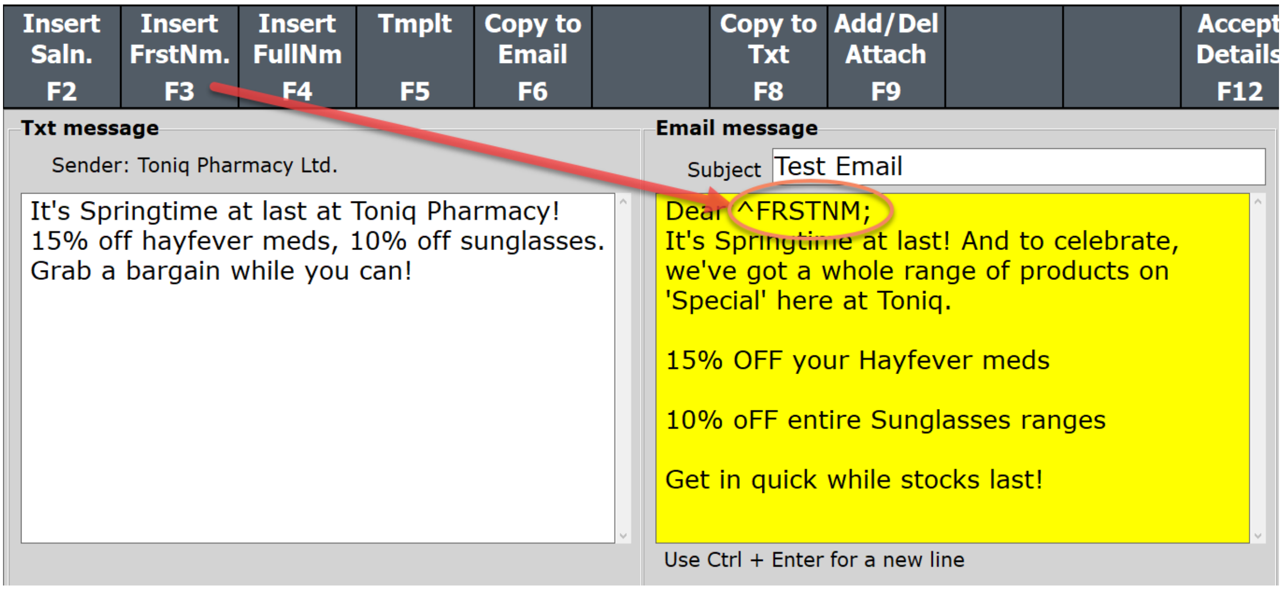
IMPORTANT!!! Toniq monitors the replies and will automatically update the client's record and set the No Texts flag for all OPTOUT replies.

Email messages: **Always give your email a subject - it will not send without one**

If you have already saved a template previously select it now. F5 Tmplt, U Use Template, spacebar to select. The previously entered content will now be inserted and you can now make changes before sending.

NB: Any changes made will not be saved into the template – these are assumed to be one off changes relevant to this promotion. To make the changes permanent: F5 Tmplt, C Create/Maintain, press spacebar to select, change and save before using again.

TIP: You can personalise your email message using the "Insert" functions



- You can add an Email Attachment - F9 [Add/Delete Attachment]. Use your <arrow keys> and <Enter> to select your drive/folder/files selection. (Folders will appear at the start of each list, followed by files). NB: not available when creating a template as attachments generally change but these can be added before each new 'send'

NOTE: To move back through your file paths, press the Backspace key
To move forward through your file paths, arrow to your selection and <Enter>

TIP: When you get to the File selection stage, you may choose to click on "File Name" at the top of the selection box to resort files then folders into Alphabetical order (default setting is files by Date Modified).

Multiple attachments can be selected, however you will NOT want to exceed 3000 Kb in size as large attachments will take longer to download! And if sending to a lot of customers, this can also use a lot of your own internet bandwidth.

To add additional attachments (or to remove an existing), press F9 again, select I for Insert or R for Remove and complete the above process. (You will still be in the same folder from your previous selection)

You can create a text and email message at the same time. The option for how to send or which medium to send is determined at the "Sending" stage.

- **So once you have created your message (email, text or both) F12 [Accept Details]**

NOTE: When deciding upon the frequency and size of your promotional emails, always bear in mind the 'nuisance factor' involved in receiving them. A short, attractive and informative promotion will usually be well-received on an infrequent basis – the opposite may not!

***Removing Clients*:** Once your message is created **F4 [No Promo]** can be used to remove any clients who do not want promotional messages, these will be showing red ticks.

- To remove these clients, press **F4 – No Promo, and then Y for Yes** to remove all No Promotional clients from your list.

NB: A GREY CROSS indicates no details are recorded for this person (i.e. no email address or cellphone number are on file). A GREEN TICK indicates that details are on file - and person wishes to receive promotional info via that medium (email or TXT). A RED TICK indicates that details are on file - but person DOES NOT WANT to receive promotional info via that medium (email or TXT)

Depending on the medium you are using to send your information (text or email) you can also remove, in bulk, any Clients without an email address or text number available.

- To do this, press F6 [Remove] and make the appropriate selection: 2 for Clients with no email address or 3 for Clients with no txt number.

Text message stats before sending

To help you get an idea of how many text messages you are sending, we now show some stats about the contact list.

Total Contacts:	2
Total Text Contacts:	1
Total Text Messages:	1

This example shows I have 2 contacts in my list, but only 1 of them will received my message, and there is only 1 text message (less than 160 characters).

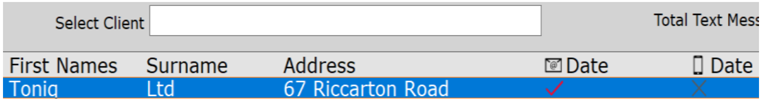
Sending Messages

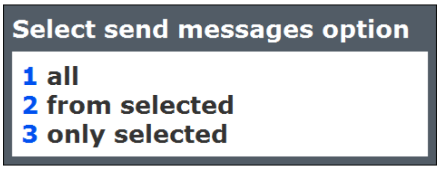
- Once your list is correct press **F9 [Send Msg]**

- You will be prompted as to your Preference for Sending messages.

Your options are Email only, Text only, Email else Txt (which means if you have created both types of message it will send to the Email address instead of Text) or Txt else Email (which means if you have created both types of message it will to send to the Text instead of Email).

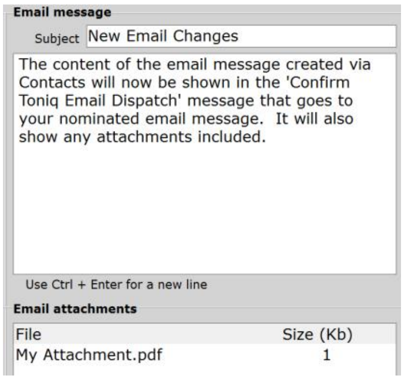
- Then you will be prompted with 1 [All], 2 [from selected], 3 [only selected]
  - **1** [All] attempts to send to the entire list.
  - **2** [From selected] lets you send from a particular highlighted client.
  - **3** [Only selected] lets you send to a particular highlighted client

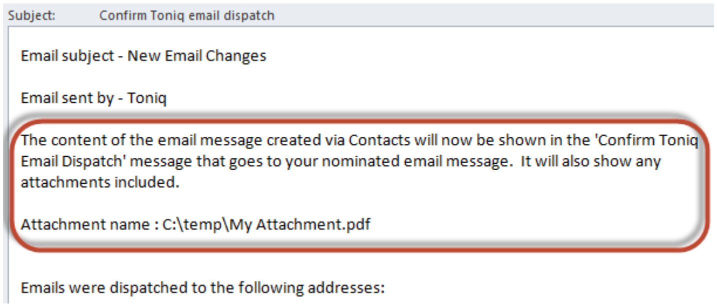




Contacts marked as No Texts cannot be sent text messages. These contact clients are automatically skipped when messages are sent.

When you send emails via the Toniq program a Despatch confirmation email is also sent to your nominated email address, detailing the send and the recipients. This confirmation also contains a copy of the email content and will detail any attachments also sent - so you can save your email confirmation as a record of the 'offer'. NB: The content and attachments listed are from the first email on the list, edits to subsequent emails are not included.





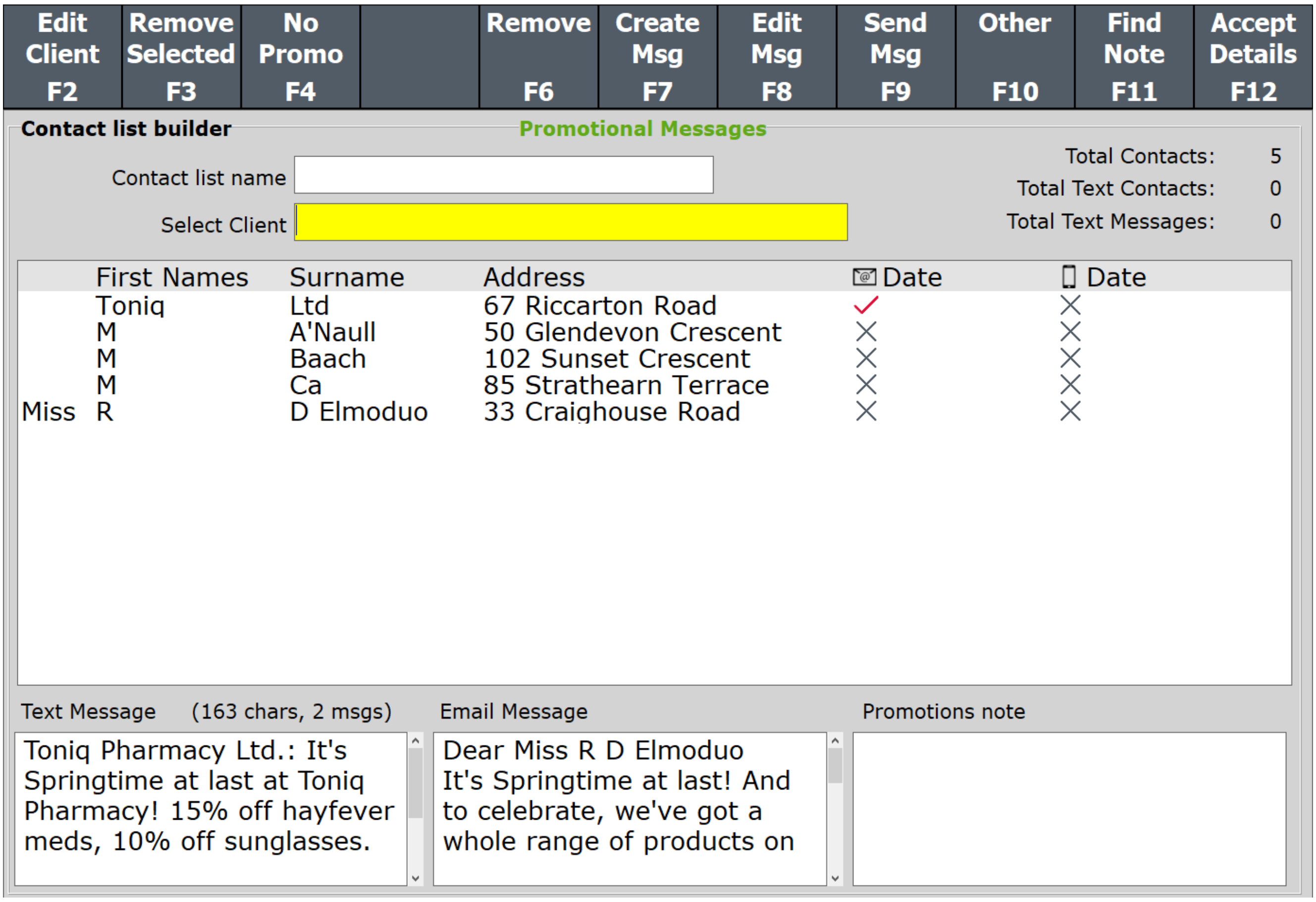
TIP - RESENDING INDIVIUDAL (OR BLOCKS OF CLIENTS):
The DATE column should change to today's date upon successful completion.

If this column does not have todays date beside a client you should F2 [Edit] the client record and check their contact details (email or mobile number). Once corrected you can attempt to send just this customers email/text again – to just them. Make sure this client is still highlighted BEFORE pressing F9 [Send Message], choose the appropriate media, then 3 [Only selected].

Or, should something 'go wrong' during your send, under F10 [Other] you will find options to 8 [Sort last email send date] and 9 [Sort last text send date]. Use these options to sort your list, then 'block select*' and F3 [Remove Selected] those clients with todays date, before resending, F9 [Send Message], to the remaining clients.

*To select a 'block' of clients highlight the first client, hold down the Shift key on the keyboard and mouse click the last client in the block.

TIP - RESENDING INTERRUPTED SENDS:
If you have started sending a text to your entire list and the send is interrupted or fails at a certain point you can choose to resend but just from a <u>particular</u> client. Highlight the client you want to restart the send from BEFORE pressing F9 Send Message. Then select your desired media (email only text only etc) and then 2 [From Selected] option.



TIP: Consider whether you should restrict who can send messages. By default, **<u>all</u>** staff members have the ability to send messages from within Retail. (Administration, Maintain Staff/ Workgroups, Maintain Staff, select a staff member & change Client Access / Edit as appropriate)

Linking the Client to a Club

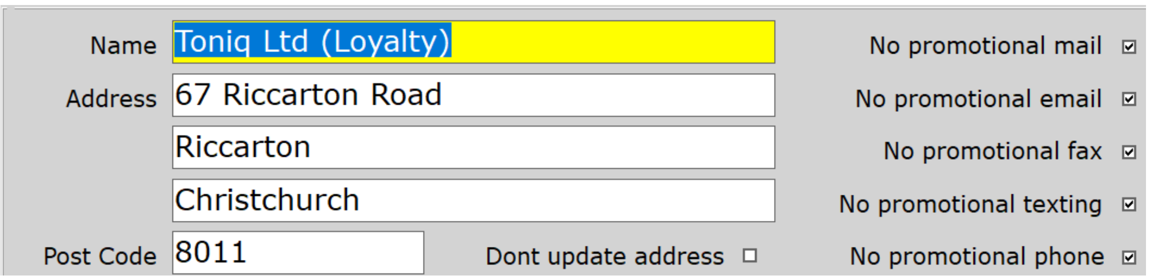
***NOTE:** You must be registered for Clubs to have the Club functionality. (Please contact Toniq if you are interested in this facility)*

- 1 [POS] 1 [POS Selling]
- F5 [Client]
- Start typing in the customers surname (or part thereof) and <Enter>
- Review the list supplied and make the appropriate selection by keying in the corresponding number displayed on the left hand side of the list or by highlighting the Clients name and <Enter>
- *(If the customer does not appear to be on the list F7 [Show Hidden] and review the list again)*

TIP: If there are several customers with the same surname, you may choose to type the Clients first name (or part thereof) into the 'First Names' field and then select from the list accordingly when found

- F2 [Edit client]
- F3 [Join Club]
- Select the Club from the list supplied
- Select Yes or No to the Promotional Mail prompt
- F12 [Accept Details]
- If the customer has agreed to promotional mail, ensure No Promotional flags are UNTICKED
- F12 [Accept Details]

If you are already at the **Edit Client** screen, just choose F3 [New Card], select the Club from the list supplied, select Yes or No to the Promotional Mail prompt, F12 [Accept Details], untick Promotional flags if applicable, F12 [Accept Details]



TIP: You can edit the current balance of the club card account (e.g. where the customer makes it known they have already recently purchased items that should count towards the club). To do this use the F8 [Edit Bals] key within Clubs. (Clubs, Maintain Club Cards, select your Client, F8 [Edit Bals]). Enter value, items or points required and <Enter>. F12 [Accept Details].

Linking the Client to a Debtor Account

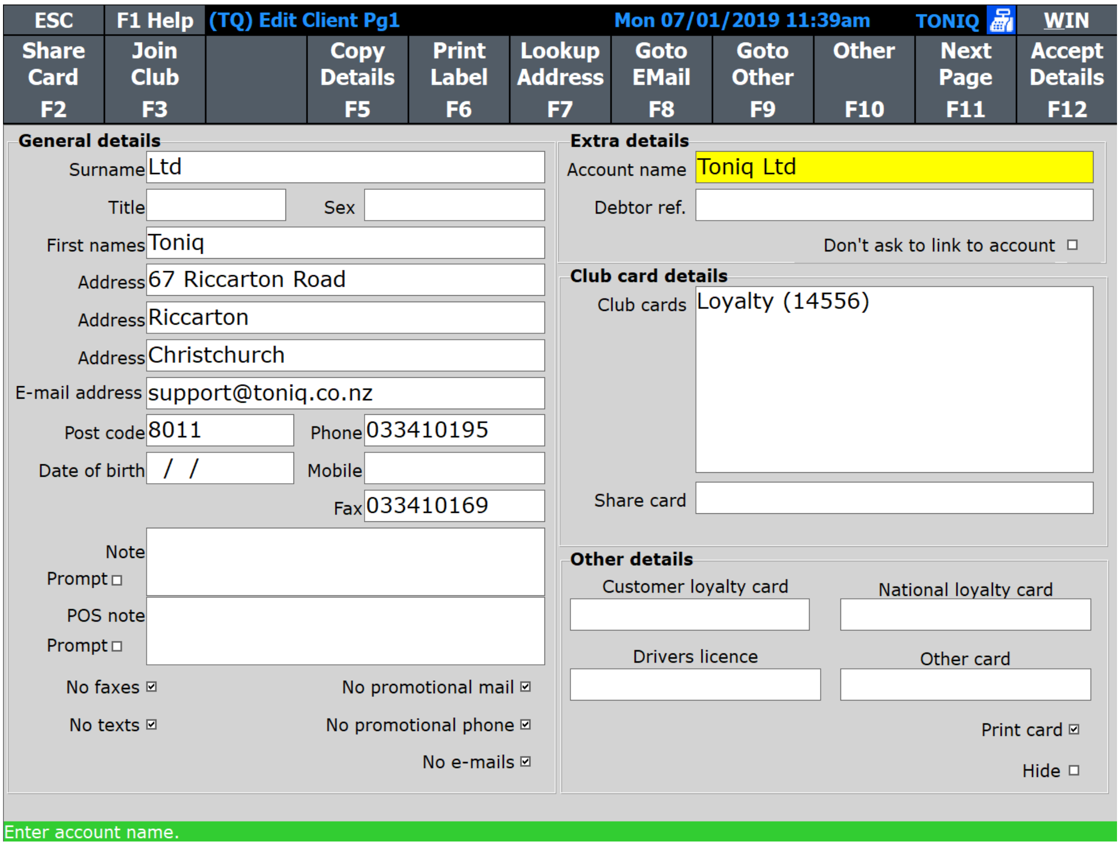
***NOTE:** You must be registered for Debtors to have the Debtors functionality. (Please contact Toniq if you are interested in this facility). The Debtor Account must be created in Debtors prior to linking. Refer to your Debtor manual for Debtor Account creation instructions*

- 1 [POS] 1 [POS Selling]
- F5 [Client]
- Start typing in the customers surname (or part thereof) and <Enter>
- Review the list supplied and make the appropriate selection by keying in the corresponding number displayed on the left hand side of the list or by highlighting the Clients name and <Enter>
- *(If the customer does not appear to be on the list F7 [Show Hidden] and review the list again)*

TIP: If there are several customers with the same surname, you may choose to type the Clients first name (or part thereof) into the 'First Names' field and then select from the list accordingly when found

- F2 [Edit Client]
- Go to the Extra Details - Account name field
- <Spacebar> and ENTER to find the debtor account
- Highlight this account and <Enter> to place the name in the client record
- F12 [Accept Details] twice

NB: To clear the Debtor name from a Client, highlight the Account name and press Delete. F12 twice to confirm



Frequently Asked Questions about Contact Clients

Q. I've recently installed Retail - where have all those clients come from already?

A. If you are already running Toniq Dispensary, your patients will automatically be accessible through Retail (minus their prescribing history for security reasons) and be known as clients. This makes sense as your customers will often be buying things from the shop at the same time as collecting prescriptions, and saves you having to re-input their details again.

In the ***Dispensary*** system your customer is known as a ***patient***,
In the ***Retail*** system your customer is known as a ***client***.

Q. How do I merge clients?

A. You cannot merge clients in Retail. Unless you are a Retail only shop and have the Non-Pharmacy flag set in General Options (Administration, Setup, General Options. Then edit Client and F10 to merge). You can merge patients in Dispensary.
Remember that in the Retail system your customers are known as clients, and in the Dispensary system your customers are known as patients. In effect they are the same thing, but your system will only store one record to keep tabs on that customer. Hence, it could be very easy to accidentally delete a patient and all of their prescribing history while processing transactions in the shop!
If you think you want to delete or merge a client/patient, first double-check by phoning Toniq. It may be that you want to merge the client's club card, or it may be better to just ***Hide*** the client (e.g. in the event of a death – especially if a family member is sharing their club card).

Q. How do I add or remove a Note from appearing on a client?

A. From the main menu select Contacts/Clients, Quick Contact Client, find the correct Client. Highlight the Client and press F2 Edit Client, Add or remove the notes required then press F12 to accept changes.
To add or remove a Note in bulk, use Maintain Contact in Bulk to find your clients. (If removing a note you can use the Note field in Client Criteria as your 'rounding up' criteria). Once your list is generated, press F4 – Set Other, then 2 to attach a POS Note, 3 to Clear a POS note and/or 4 to Set or Unset the prompt option.

Q. Can I save my Maintain Contacts in Bulk list as a Contacts List?

A. Yes. Once your list is generated, press F9 Contact Clients, type a name into the Contact List Name field, F12 to save. You can recall the from Main Menu, 4. Contact Clients, 3. Maintain contact lists. Spacebar and select the previously saved list. You can also recall the list for bulk maintenance using the On contact list option.

Q. Who gets a Retail or RX discount and how much is set ?

A. Go into Contacts/Clients, then Maintain/contact clients in Bulk. Tick the Gets Retail Discount or Gets RX Discount boxes. Press F11 to the Next page. Tick the Retail Discount or Rx Discount Incl boxes and set a width of 100. (Make sure that the overall width figure for all selections does not exceed 2000). F11 back to page 1 and then F12 Accept. Once the list is generated, press F7 Print List, then F12 Print.

NB: If you tick BOTH Gets Retail Discount AND Gets RX discount options this will only find your clients that have BOTH a Retail AND RX discount on their client record.

Q. Why are some of my Clients showing Red in lists and search screens?

A. It is possible to set Toniq to highlight HIDDEN clients red for easy recognition. To turn this option on go into Administration (7), Setup (1), General Options (8). Tick the "Highlight Hidden Items" box and F12 Accept Details.

Frequently Asked Questions about Text and Email

Q. How does it work?

A. Your clients and patients give you permission to use their cell phone numbers or e-mail addresses for contact. The Toniq programs can help you quickly select the 'right' clients for the 'right' message.

E-mails are forwarded directly to your internet provider (ISP) for distribution.
TXTs are forwarded to a Toniq Web Server computer then to a specialist communications company which interfaces to Vodafone and Telecom. All of this happens in seconds.

Your own e-mail address will be sent an acknowledgement that the TXT or E-mail has been forwarded successfully (as far as possible), including the subject of the message and who was logged on at the time it was sent.
Clients can reply directly to you to confirm, query, or even *unsubscribe*. Your pharmacy receives the reply as an E-mail.

Q. Do I need special equipment?

A. No, you only need an internet connection on a computer running Toniq Dispensary or Retail. A permanent higher speed connection such as 'Jetstream' will speed things up.

Q. What about Client Privacy?

A. Always get permission before sending TXTs or E-mail. There are real marketing and loyalty benefits with direct contact BUT your clients must 'opt-in'. Have a form for the clients to sign and start collecting permissions – see the end of this manual for printable examples. Clients should be able to 'opt-out' at anytime. Toniq has put permission 'flags' on the client records to help you.

Q. What about Spam?

A. No problem - don't do it! Just make sure that your message will be valued by your client.

Q. How much does it cost?

A. A lot less than phone calls or regular mail! There is NO fee for e-mail.
Using the TXT system costs $12 per month and 13 cents a TXT + GST.

Q. How do I get started?

A. **E-mailing** – there is no signup process. Ensure you have an internet connection and enter your details into the program as outlined in the previous pages.

A. **TXTing** – register your interest with Toniq. We will set up the external texting links for you. You will still need an internet connection, and enter your details into the program

Q. How do I remove the 'No Promotional Mail / Text / Email' flags?

A. This can be done by going into each individual client, however it is easier to do this in bulk using Maintain Contacts in Bulk. From the main menu go into Contacts/Clients, Maintain Contacts in Bulk. Use the criteria options to 'round up' the clients you want to contact, then press F12. Once the generated list is on the screen, press F6 Set Promotion. Select the type of mail you wish to unset (or you can do all four), tick the Unset box and then press F12 to accept. When prompted to confirm changes say Yes.

Q. What does "Class not registered" mean when I try to send a text message?

A. The exe to allow texting has not run correctly on this computer. This file can be found in 2 locations.
Double click My Computer, C:/ (or local disc), Program Files, Dispensary. Find MIMSSetup.exe and run this file.
OR you can log onto the internet and go to www.toniq.co.nz/tools. Select Texting Services then MIMSSetup.exe and follow the wizard through the installation process.

Q. What does "No messages sent. Soap Call failed. Pharmacy not permitted to send SMS messages" mean when I try to send a text message?

A. You may not have a GUID in your database which is necessary before sending messages. Contact Toniq to have this assigned correctly.

Q. What does "Send Failed. Can't open file ...." mean when I try to send a text message?

A. The attachment that you are trying to send as part of your email is probably still open. Close this file and try again

Q. How do I know what emails did not send from a list?

A. If you have eg 180 contacts on your list but the emails report 150 sent, review the DATE column, down the centre of the page. Those that DONT have todays date did not send.

Q. "Message too long" when I go to send it but the character count was OK when I created the message. What is wrong?

A. If you have created the message initially and then went back into it you probably chose EDIT Message instead of Create Message. This will only have shortened / changed the message for that ONE customer. Copy the 'correct' message and then go F7 Create and paste it in here. The message should be the right length for ALL clients now.

Q. What does Email not configured mean?

A. The SMTP server has not been configured. Go into 7 [Administration], 1 [Setup], 9 [Internet/web options], 9 [Maintain Internet options]. Under Email options enter the correct SMTP. (some are listed under the Text/Email to client section of this manual)

Appendix A - SMTP addresses

smtp.xtra.co.nz	smtp.clear.net.nz
mail.iconz.co.nz	smtp.ihug.co.nz
mail.orcon.net.nz	smtp.paradise.net.nz
mail.enternet.co.nz	smtp.eol.co.nz
smtp.watchdog.net.nz	smtp.southnet.co.nz
mail.esi.co.nz (Sthld)	smtp.qsi.net.nz (quicksilver)
smtp.wave.co.nz	mail.actrix.co.nz
mail.netlink.co.nz	mail.world-net.co.nz
smtp.xnet.co.nz	smtp.globe.net.nz
mail.dreamnet.co.nz	mail.i4u.net.nz
smtp.slingshot.co.nz	smtp.datasolutions.net.nz
smtp.dsnet.net.nz	smtp.inspire.net.nz
smtp.ezysurf.co.nz	smtp.iprolink.co.nz
smtp.maxnet.co.nz (diginet)	securemail.inspire.net.nz (Port 25 or 465)
(old) smtp.local.lan (Life Outersite) or	smtp.rasvpn.net.nz (life - new)
mail.inhb.co.nz (Hawkes Bay)	smtp.snap.net.nz (for yrless.co.nz)
smtp.vodafone.co.nz	smtp.transpeer.net
smtp.callplus.net.nz	smtp.voyager.co.nz

mail-relay.vibecom.co.nz (vibe communications)
smtp.inspire.net.nz (Palm North, New Plymouth)
mail.mas.viperplatform.net.au *or* 202.147.74.50 (intagr8)

TXT Permission to contact me **E-Mail**
about topics that may be of interest of value to me

My medications Phone ☐ TXT ☐ E-Mail ☐
(e.g. repeats due, owings)

Loyalty Clubs, Specials Phone ☐ TXT ☐ E-Mail ☐
Birthday

Name:	
Address:	
Address	
Phone:	
Cell Phone:	
Email:	
Birthday:	DD / MM / YY ________/_______/_______ Optional

Comment:

I know that I can ask this pharmacy to stop contacting me at any time

Date:________ Signed:_______________ Staff_____

TXT Permission to contact me **E-Mail**
about topics that may be of interest of value to me

My medications Phone ☐ TXT ☐ E-Mail ☐
(e.g. repeats due, owings)

Loyalty Clubs, Specials Phone ☐ TXT ☐ E-Mail ☐
Birthday

Name:	
Address:	
Address	
Phone:	
Cell Phone:	
Email:	
Birthday:	DD / MM / YY ________/_______/_______ Optional

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(e.g. repeats due, owings)

Loyalty Clubs, Specials Phone ☐ TXT ☐ E-Mail ☐
Birthday

Name:	
Address:	
Address	
Phone:	
Cell Phone:	
Email:	
Birthday:	DD / MM / YY ________/_______/_______ Optional

Comment:

I know that I can ask this pharmacy to stop contacting me at any time

Date:________ Signed:_______________ Staff_____

TXT Permission to contact me **E-Mail**
about topics that may be of interest of value to me

My medications Phone ☐ TXT ☐ E-Mail ☐
(e.g. repeats due, owings)

Loyalty Clubs, Specials Phone ☐ TXT ☐ E-Mail ☐
Birthday

Name:	
Address:	
Address	
Phone:	
Cell Phone:	
Email:	
Birthday:	DD / MM / YY ________/_______/_______ Optional

Comment:

I know that I can ask this pharmacy to stop contacting me at any time

Date:________ Signed:_______________ Staff_____