SendEx

SendEx allows you to create and send emails or SMS messages to multiple customers without tying them to a TouchPoint campaign. Additionally, it gives the ability to set up a Transactional task in which SendEx will constantly query a table to see if a new record is added and will send a message when one is found.

Creating a SendEx

SendEx is split into four areas: Campaign, Properties, Fields, and Transactional Options.

Campaign Section:

- Provider - The provider the Email or SMS message will be sent from.
- Modes -
  - **Standard** - This is a standard email or SMS sent out to specified customers.
  - **Test** - A Test SendEx can be used for experimenting with a new HTML template, email server, or any general testing purposes. When in test mode, the SendEx takes a lower priority to a Standard or Transactional SendEx and does not log data in the email report tables.
  - **Transactional** - A Transactional SendEx typically uses a table that has customers added to it on a regular basis. This SendEx sends an email to newly added customers on a specific table. This type of SendEx runs continuously and can be paused or resumed at any point.

Properties Section:

- Campaign Id - The Campaign Id for the SendEx task.
- Touch Id- This is where you can add in a Touch Id for the SendEx task. This field is optional.
- Table - This is where you select the table and apply a filter for the table that you want SendEx to query.
- HTML File - An HTML file which you would like SendEx to use.
- Pull HTML File. Preheader, and Subject From Database - Check this option if you would like those values populated by a field from the Table you previously selected.
- Message - The text content of the SMS message.
- Subject - The subject line of the email.
- Preheader - The Preheader of the email.

Fields Section:

- 'To' Email Address - This is where you map the field that contains the email address from the previously selected table.
- 'To' Mobile Number - This is where you map the field that contains the mobile number from the previously selected table.
- Customer Key - This is where you map the field for the unique customer identifier, such as CustomerNumber, from the previously selected table. This field is optional.
- 'From' Email Address Override - This is where you map the field for the From Email Address found on the previously selected table if you would like to override the Provider in the Campaign Section of SendEx. This field is optional.
- Seed Indicator - This is where you map the field from the previously selected table that indicates if the record is a seed. This field is optional.

Transactional Options Section (Only available in Transactional Mode)

- End Date/Time - When you would like the task to end. You can also select No End Date.
- Sequence - This is the unique identifier--such as a RowID - which SendEx will use to see if a row has already been selected to send a message to.

> ✅ **To Build a SendEx Campaign**
>
> 1. Select a Provider
> 2. Select a Mode
> 3. Supply a Campaign Id.
> 4. Select a table that you would like to query using the SQLManager icon. Click on the Filter icon to apply a filter to your query.
> 5. If you are building an Email SendEx, select an HTML File and enter a Subject and Preheader. If building an SMS SendEx, enter the text you would like to send.
> 6. Map the required fields in the Fields Section to their corresponding field from the table you previously selected.
> 7. If you selected Transactional Mode, then select a Sequence field from the drop-down list and enter a End Date/Time or check No End Date.
> 8. **Save** or **Submit** the SendEx.

Task Complete Notifications

The SendEx Menu and Toolbar

The SendEx toolbar gives quick access to commonly used commands. Click an icon once to carry out the action.

Icon	Description	Menu Equivalent
	Opens a new SendEx window.	**File** > **New**
	Opens a saved SendEx report.	**File** > **Open**
	Saves the current SendEx report.	**File** > **Save**
–	Allows you to select how and where the SendEx report is saved.	**File > Save As**
	Opens a saved SendEx report found on your local machine.	**File > Local > Open**
	Saves the open SendEx report to your local machine.	**File > Local > Save**

When creating a SendEx, there is an option to receive a notification when a task completes or when it errors. You can choose to be notified when the SendEx encounters an error/cancellation, has been disabled, or has completed. These options are available when creating a SendEx, but if the SendEx is already running it can be paused and selected from that point as well. Be sure to save the SendEx after the notification has been selected.

⊘ How to Setup a SendEx Notification

1. Select the SendEx. A running SendEx must be paused before editing the notifications.
2. Inside the SendEx window select File > Properties.
3. In the Task Complete Notification area, select the desired task notification from the three criteria:
   - Disabled
   - On Complete
   - On Error/Cancellation
4. Click **OK** to save your changes.

✓	Verifies the current SendEx report is setup correctly.	**File** > **Validate**
✓	Checks the amount of messages that will be sent when submitted (not available in Transactional Mode).	**File** > **Extended Validation**
▶	Runs the current SendEx report.	**File** > **Submit**
🖶	Prints the current SendEx report.	**File** > **Print**
🕑	Opens the Scheduler module to schedule the current SendEx report.	**File** > **Schedule**
🗔	Opens the Properties window.	**File** > **Properties**
Exit	Closes the SendEx module.	**File** > **Exit**
HTML	Opens the HTMLEditor module.	**Tools** > **HTMLEditor**
▽	Opens the Filter window.	**Tools** > **Filter**
--	Opens the SendEx help files.	**Help** > **Application Help**