

# Graydon Security Marketing & Billing Automation Phase I



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## MARKETING & BILLING AUTOMATION PHASE I WRAP-UP

*Update from Troy: March 6, 2014*

→ **#1 Focus: Online billing - Microkey & Freshbooks.**

- ◆ Microkey E Payment module offers online billing, but needs to be configured to work with Graydon credit card merchant account / payment gateway.
  - Kim has confirmed that merchant account is Chase. Microkey supports Chase Merchant Services (in the US, anyways). Tech Support sent detailed instructions for setup from here:  
<http://34help.mkscentral.com>  
Click on search and search "Payment gateway" and "E Payment", then select '5. Payment Gateways' from menu on left side.
  - **Graydon to confirm if Troy will attempt setup or handle setup in-house.**
- ◆ Freshbooks online recurring invoicing & manual invoice payments work with Graydon's free PayPal account. Freshbooks will also work with Chase (Graydon's existing credit card merchant account / payment gateway).
  - **Automated recurring payment processing (NOTE: different than recurring invoices) requires:**
    1. **PayPal Pro merchant account (upgrade \$30 per month).**
    2. **A new merchant account i.e. Stripe.**
    3. **Integration of Graydon's current Chase account.**
  - **Graydon to confirm preferred choice. Important to note difference between recurring invoicing and recurring billing. Billing means processing scheduled online invoice payments automatically (without customer interaction).**
- ◆ Freshbooks easily imports customer data from Microkey export, however, data format is important for smooth sharing. Microkey data export should match this sample: <http://aboutwebsites.ca/project/graydon/> (scroll down, click 'Data Import Format' link to download Excel file sample).

- **Data cell format: FirstName | LastName (vs. LAST, First); Address | City | Province | PostalCode (vs. address, city, prov, postalcode).**
- **Service ID will be used as the unique 'KEY' for connecting customer records in Microkey, FreshBooks & Newsletter system.**
- ◆ **Test invoices sent & paid online by Chris & Ed. Troy to invoice staff members for annual recurring monitoring fees as a trial run, then gather feedback from staff.**

**→ #3 Focus: Customer Email address management.**

- ◆ ConstantContact.com and MailChimp.com will be tested for Freshbooks integration & template selection.
  - Troy will import email addresses via Freshbooks and/or directly from Microkey export spreadsheet.
  - Customer sign-up form can be added to website(s) for list building.
  - **List creation, segmentation and/or tagging needs to be planned by Chris.**
  - **Be aware that we will have customers in multiple systems. Freshbooks and Newsletter software allow clients to easily update contact details. Keeping Microkey updated will be ongoing manual process.**

**→ Next steps...**

- ◆ Continue with Freshbooks setup, add new logos & continue online invoicing for staff. Gather feedback. Re-assess.
- ◆ Send logon credentials for PayPal, FreshBooks, ConstantContact & MailChimp to Chris.
- ◆ Assist Kim with FreshBooks admin & reporting, if required.
- ◆ Dina to continue with call center email address drive to update customer records with valid email address in Microkey. One list received February 24th.

- ◆ Create email follow-up in newsletter system for client email address verification (to get a handle on effectiveness of call center campaign).
- ◆ Meeting on Monday, March 10th with Chris, Ed & Troy to select newsletter software of choice and discuss Phase II.
- ◆ Prepare Phase II Project Document for Management including:
  1. List Creation & Newsletter Plans
  2. Online Billing Plans
  3. Google Domination Strategy & Target Keywords

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## MARKETING & BILLING AUTOMATION PHASE I

*Update from Troy: February 24, 2014*

### → Microkey Tech Overview...

- After much waiting and numerous phone calls, we now have a contact in Tech support named Luis. Tech Support was helpful, but not bearing the best of news for Graydon, unfortunately.

### → #1 Focus: Online billing.

- ◆ Microkey E Payment module offers online billing, but needs to be configured to work with Graydon credit card merchant account / payment gateway.
  - Since Kim is not willing to have regional office processing payments with Graydon merchant account (in Microkey) at this time, proposed solution is to set up PayPal as merchant provider in Microkey E-Payment module.
  - **PayPal Pro API is required at \$35 per month, 2.9% + \$.30 per transaction fees.**
  - **Setting up PayPal Pro merchant account will require participation from Graydon Management as it needs to be 'verified' with an existing business bank account.**
  - **This solution does not provide fully-automated recurring invoicing / billing.**

### → #2 Focus: Email invoices to existing customers.

- ◆ Microkey confirmed that Outlook is the only option for email within Microkey. The steps to set up email:
  1. Install Outlook on server.

2. Configure Microkey to work with Outlook.
  3. When user who is logged into Remote Desktop clicks 'email' from within Microkey, the email account associated with that Remote Desktop user will be used.
- Max to confirm if each Microkey user has their own Remote Desktop credentials (I.E. Their own desktop on the server) or if you have users who share logon credentials.
  - Email process and functionality is dependant on user configuration; specifically, if each Microkey user has their own Remote Desktop, then each user could use their own email / Outlook account. If your Microkey users share Remote Desktops, then a blanket email (I.E. Billing@graydon, Admin@graydon) would need to be used.

→ **#3 Focus: Customer Email address management.**

- ◆ Microkey has confirmed that external software must be used for email management (I.E. newsletters, accounts receivable).
  - **Issue: Graydon does not have email addresses for many customers.**
  - **Issue: External software offers customers the ability to update their contact info online. In this event, external software will have current contact info while Microkey may still have old contact info.**
  - Recommended software [www.GetResponse.com](http://www.GetResponse.com) or [www.MailChimp.com](http://www.MailChimp.com) with estimated cost for list size of 5000 is \$50 per month.

→ **#4 Focus: Customer billing data management.**

- ◆ Microkey confirmed that they offer Paypoint & Webview module that provides these functions:
  - Customer Portal where customers can login.
  - Pay full invoices online.
  - Update contact & billing info online.
  - **Issue: Paypoint & Webview costs \$1000 setup plus \$35 per month**

**support, and requires Graydon to provide SSL certificate on server (with Microkey installed). They advise to run on a different server than your main Microkey installation. Requires effort from Max for sure.**

**→ Next steps...**

- ◆ Await feedback & further direction from Graydon Management.
- ◆ Recommend best software solution for each task to Management.
- ◆ Max to confirm installation of Outlook on server.
- ◆ Dina to provide status on call center email address drive to update customer records with valid email address in Microkey.

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## MARKETING & BILLING AUTOMATION PHASE I

*Meeting Minutes: February 6, 2014 with Ed, Max & Dina*

→ **Microkey orientation, server configuration & testing.**

→ **Focus of meeting:**

- 1. process credit card payments online**
- 2. email invoices**
- 3. customer email address management**
- 4. customer & billing data import/export/synch**

- ◆ Based on information from this meeting, testing, and consulting with Microkey, Troy will recommend the best recurring billing & email (CRM) software, if Microkey can't do the job effectively.

→ **#1 Focus: Online billing.**

- ◆ Microkey E Payment module offers online billing, but needs to be configured to work with the credit card merchant account.
  - **Issue: Kim is not willing to have regional office processing payments with Graydon merchant account (in Microkey) at this time.**
  - Proposed solution is to set up PayPal account and select PayPal as merchant provider in Microkey E-Payment module. Setting up PayPal merchant account will require participation from Graydon Management as it needs to be 'verified' with an existing business bank account.

→ **#2 Focus: Email invoices to existing customers.**

- ◆ Confirmed that Microkey is running on Windows 2003 Server, with each office Remote Desktopting in and using 1 copy of Microkey (as opposed to running Microkey on local computer and accessing data via VPN).
  - **Issue: Email is not configured, therefore, not working. According to Microkey, best email option is Outlook, but we don't want to install Outlook on the server (unless no other option exists).**



- **Issue: If all staff are using 1 instance of Microkey configured to email via Outlook, this may result in all staff also sending email from a single email address... not good for 'reply-to' or follow-up after email is sent to customers.**

→ **#3 Focus: Customer Email address management.**

- ◆ Troy got acquainted with Microkey at call center and successfully exported data in CSV file format for Aged Accounts Receivable, Specific Invoices & Audit Report that shows added & edited email field (with supporting customer data).
- ◆ With this functionality, it will be possible to document a step-by-step procedure for exporting customer ID, name & email address (for use in CRM software of choice)
  - **Issue: CRM software offers customers the ability to update their contact info online. In this event, CRM will have current contact info while Microkey may still have old contact info.**

→ **#4 Focus: Customer billing data management.**

- ◆ Troy got acquainted with Microkey at call center and successfully exported data in CSV file format for Aged Accounts Receivable, Specific Invoices & Audit Report that shows added & edited email field (with supporting customer data).

→ **Next steps...**

- ◆ Work with Microkey to conclude which features will work for billing & customer data management & communications.
- ◆ Recommend best software solution for each task to Management.
- ◆ Max to investigate installation of Outlook on server.
- ◆ Dina to initiate call center drive to update customer records with valid email address in Microkey. Suggested set up tracking sheets with customer ID, name & email address to be submitted weekly by call center.

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## MARKETING & BILLING AUTOMATION PHASE I

*Meeting Minutes: February 4, 2014*

→ **Software analysis of Microkey & alternatives required.**

- ◆ Troy to get acquainted with Microkey at call center & Ed's office. Contacts: Val ([vkhan@microkey.com](mailto:vkhan@microkey.com)) & Kim Naeth at PG office. Issues include data export (Excel?) & email management from server (Outlook, Hosted Exchange)
  1. **Goal: Use Microkey for online billing & emailing (CRM).**
- ◆ Troy to recommend the best recurring billing & email (CRM) software, if Microkey can't do the job effectively.

→ **Billing, Marketing & Websites too vast to tackle all at once.**

→ **Breaking out 2 key focal points to attack first: Online Billing & CRM.**

◆ **#1 Focus: Online billing**

- Sample customer data from Kim (10 customer records from Microkey).
- plus Vernon office receivables over 90 days.
  1. **Goal: Import customer data into new system, follow up billing via email, monitor results.**

◆ **#2 Focus: Customer contact data management (CRM)**

- **In order to bill or communicate with customers, we require email addresses.**
- Initiate call center drive to update customer records with valid email address in Microkey.
- Set up tracking sheets with customer ID and email address to be submitted weekly by call center.
- Troy to enter data into CRM and verify email addresses are working, then report results back to Ed.
- Recommend rewards for call center staff per email address, plus bonus for confirmed email addresses.
  1. **Goal: Verified working email address for every customer in**

**Microkey & CRM system of choice.**