Marine CRM HubSpot campaign data process

**Triton – Yachts data**

**Bookings & Quotes**

*Conditions*

**Booking - Brand name** in list ‘SUN’ / ‘MRG’

**Booking - Status** in list ‘Booking’ / ‘Quote’

**Booking - Booking source primary** not in list ‘PR-Pr free trip,TAAC-Ta on account,PR-Public relations-mor,PRESS-Bericht in der press,STAFF-Staff booking,OWNS-Owner with no paymen,OS-Wot-offshore sailing,OWNER-Owner,DAYCH-Day charter discount,LOCAL-Local booking,OS-Offshore sailing,OSS-Offshore sailing,OW-Owner use,OPS-Operations/maintenan,TA,STHOL-Staff holiday,TAGEN-Travel agent,OSSFF-Staff friends & fami,LOCA2-Local booking,TO-Tour operator’

**Booking - Area code** not in list ‘UKD, UK1,CVO,SS1, UK2, SS2, UK3, FLT, UK4’

**Booking - Product name** in list ‘SAILING\_SCHOOLS, CREWED, FLOTILLA, FRANCHISE, FOOTLOOSE, BAREBOAT, CORPORATE, POWER

**Client - Deceased** not in list ‘Y’

**Client - Blacklisted** not in list ‘Y’

**Booking - Booking type** in list ‘DIRECT’

**Booking - User definable 1** is not ‘NULL’

**Booking - Booking date** greater than or equal to ‘XXXXXXXX’

*Output fields*

Booking – Brand name

Booking - Booking office location

Booking – Booking language full

Booking – Product name

Booking – Booking date

Booking – Confirm date

Booking - Departure date

Booking – Area name

Client – Client code

Client – Title

Client – First name

Client – Last name

Client – city

Client – county

Client – Postcode

Client – Country

Client – email1

Client Preferences – cancel from mailing

Client preferences – cancel from email

Client – deceased

Client – blacklisted

Booking – user definable 1

*Steps*

1. Extract data from Boxi
2. Sort by booking date, latest to earliest (remove sort by departure date)

Possible change:

Sort by:

1. Departure date – Newest to Oldest
2. Confirmation Date – Newest to Oldest
3. Booking Ref – Largest to Smallest
4. Client ID – Largest to Smallest
5. Email – Z to A
6. Cancel from Email – Z to A
7. Cancel from Mail – Z to A
8. Cancel from Telephone – Z to A
9. Cancel from Brochure – Z to A
10. Convert the date fields to american format
11. Identify the hull type based on the 3rd letter from the user definable field. If ‘X’, ‘L’ or ‘P’ then ‘Catamaran’ otherwise ‘Monohull’
12. Sales office clean up, Sil has a look-up table that cleans the sales office names:



1. Dedupe the list by email address
2. Remove the blank email address row
3. ‘SUN’ is converted to ‘Sunsail’/ ‘MRG’ is converted to ‘Moorings’/ ‘FTL’ is converted to ‘Footloose’
4. Look up against ‘Do not email’ flag from Triton, if found change ‘cancel from email’ flag in output to ‘Y’
5. Look up against Cheetahmail ‘unsubscribe’ list and if found change ‘cancel from email’ flag to ‘Y’
6. Any other records not found in steps 9) & 10) above, set ‘cancel from email’ flag to ‘N’
7. If ‘Cancel from mailing’ flag is blank, set to ‘N’
8. Map fields and upload to HubSpot

**Brochure requests**

*Conditions*

**Brochure request – Date requested** greater than or equal to ‘XXXXXXX’

**Client - Deceased** not in list ‘Y’

**Client - Blacklisted** not in list ‘Y’

**Brochure request – Brochure name** in Mor power bro w/rates cl & ta,Sunsail yacht brochure,Sunsail flotilla brochure,Bareboat bro w/rates - cl & ta,Sailing schools,CONTACT,Bareboat bro w/rates - ta,Sunsail racing,Club brochure,Crewed bro w/rates -cl & ta,Special germany

**Client - Client system brand** in list ‘Sunsail’/ ‘Moorings’

*Output*

Brochure request – Location

Brochure request – Client ID

Client – Title

Client – First name

Client – Last name

Client – city

Client – county

Client – Postcode

Client – Country

Client – email1

Client Preferences – cancel from mailing

Client preferences – cancel from email

Client preferences – cancel from brochure

Client – deceased

Client – blacklisted

Brochure request – Brochure name

Brochure request – Date requested

*Steps*

1. Extract data from Boxi
2. Sort the date requested latest to earliest
3. Convert the date fields to american format
4. Sales office clean up, Sil has a look-up table that cleans the sales office names
5. Dedupe the list by email address
6. Remove the blank email address row
7. Add a brand column to state ‘Sunsail’/ ‘Moorings’/ ‘Footloose’
8. Look up against ‘Do not email’ flag from Triton, if found change ‘cancel from email’ flag in output to ‘Y’
9. Look up against Cheetahmail ‘unsubscribe’ list and if found change ‘cancel from email’ flag to ‘Y’
10. Any other records not found in steps 8) & 9) above, set ‘cancel from email’ flag to ‘N’
11. If ‘Cancel from mailing’ flag is blank, set to ‘N’
12. A language column will need to be inserted, logic TBD

Possible change:

Use Language lookup table

1. Map fields and upload to HubSpot

**eNews sign ups**

*Conditions*

**eNews signups- Efetdt** is greater than ‘XXXXXX’ (although number format)

*Output fields*

eNews signups- Effnam

eNews signups- Eflnam

eNews signups- Efmail

eNews signups- Efctcd

eNews signups- Eflgid

eNews signups- Efetdt

eNews signups- Efetdt

*Steps*

1. Extract data from Boxi
2. Use look-up table to create ‘Country of residence’, ‘Market’ and ‘Language’ fields from Efctcd field.
3. ‘Date’ field created from converting ‘Edetdt’ field
4. To give output file as per sample below:
5. Sort by ‘Date’ – latest to earliest
6. Convert the date fields to american format
7. Dedupe the list by email address
8. Remove the blank email address row
9. Add a brand column to state ‘Sunsail’/ ‘Moorings’/ ‘Footloose’
10. Add a ‘Cancel from email’ column
11. Look up against ‘Do not email’ flag from Triton, if found set ‘cancel from email’ flag in output to ‘Y’
12. Look up against Cheetahmail ‘unsubscribe’ list and if found set ‘cancel from email’ flag to ‘Y’
13. Any other records not found in steps 10) & 11) above, set ‘cancel from email’ flag to ‘N’
14. Map product interest using field ‘efsite’ using look up table below:

|  |  |  |  |
| --- | --- | --- | --- |
| Moorings |  | Sunsail |  |
| P | Power | S | Schools |
| C | Crewed | B | Bareboat |
| B | Bareboat | L | Flotilla |

1. Map fields and upload to HubSpot

Others

We don’t currently load customer data other than the above but we would want to load new prospect data. We need to come up with a procedure, at some point, to load these.

**Neptune - Le Boat data**

**Bookings**

*Conditions*

**Booking – Brand name** in list ‘LE BOAT

**Booking - Status** in list ‘Confirmed’

**Booking - Booking type** in list ‘DIRECT’

**Client - Blacklisted** not in list ‘Y’

**Client - Deceased** in list ‘N’

**Booking - Confirm date** greater than ‘XXXXX’

**Client - Lead** in list ‘Yes’

*Output fields*

Bookings

Booking - Brand name

Booking – Booking office

Booking – Booking language

Client – Client Code

Client – Title

Client – First name

Client – Last name

Client – city

Client – county

Client – Postcode

Client – Country

Client – email1

Client – deceased

Client – blacklisted

Client Preferences – cancel from mailing

Client preferences – cancel from email

Booking – Booking date

Booking – Confirm date

Booking - Departure date

To be added

Booking – Base name (currently base code)

Booking – Boat type

*Steps*

1. Extract data from Boxi
2. Sort by booking date, latest to earliest (removed departure date)

Possible change:

Sort by:

1. Departure date – Newest to Oldest
2. Confirmation Date – Newest to Oldest
3. Booking Ref – Largest to Smallest
4. Client ID – Largest to Smallest
5. Email – Z to A
6. Cancel from Email – Z to A
7. Cancel from Mail – Z to A
8. Cancel from Telephone – Z to A
9. Cancel from Brochure – Z to A
10. Convert the date fields to american format
11. Sales office clean up, Sil has a look-up table that cleans the sales office names:



1. Dedupe the list by email address
2. Remove the blank email address row
3. Look up against ‘Cancel from email’ flag from Neptune, if found change ‘cancel from email’ flag in output to ‘Y’
4. Look up against Cheetahmail ‘unsubscribe’ list and if found change ‘cancel from email’ flag to ‘Y’
5. Any other records not found in steps 8) & 9) above, set ‘cancel from email’ flag to ‘N’
6. If ‘Cancel from mailing’ flag is blank, set to ‘N’
7. Map fields and upload to HubSpot

**Quotes**

*Conditions*

Remove date greater than or equal to 25/08/2015

Company no in list ‘5’

*Output fields*

Rembook – Location

Rembook – Language

Rembook – Remove date

Rembook – Departure date

Rembook – Mail no

Rembook – Title

Rembook – Firstname

Rembook – Surname

Rembook – City

Rembook – County

Rembook – Postcode

Rembook – Country

Rembook – Email 1

To be added

Client – deceased

Client – blacklisted

Client Preferences – cancel from mailing

Client preferences – cancel from email

*Steps*

1. Extract data from Boxi
2. Add brand name column and populate with ‘Le Boat’
3. Sort by departure date, latest to earliest
4. Sort by remove date, latest to earliest

Possible change:

Sort by:

1. Departure date – Newest to Oldest
2. Confirmation Date – Newest to Oldest
3. Booking Ref – Largest to Smallest
4. Client ID – Largest to Smallest
5. Email – Z to A
6. Cancel from Email – Z to A
7. Cancel from Mail – Z to A
8. Cancel from Telephone – Z to A
9. Cancel from Brochure – Z to A
10. Convert the date fields to american format
11. Sales office clean up, Sil has a look-up table that cleans the sales office names
12. Dedupe the list by email address
13. Remove the blank email address row
14. Look up against ‘Cancel from email’ flag from Neptune, if found change ‘cancel from email’ flag in output to ‘Y’
15. Look up against Cheetahmail ‘unsubscribe’ list and if found change ‘cancel from email’ flag to ‘Y’
16. Any other records not found in steps 9) & 10) above, set ‘cancel from email’ flag to ‘N’
17. If ‘Cancel from mailing’ flag is blank, set to ‘N’
18. Map fields and upload to HubSpot

**Brochure requests**

*Conditions*

**Client - Blacklisted** not in list ‘Y’

**Client - Deceased** in list ‘N’

**Client - Lead** in list ‘Yes’

**Brochure request – Date requested** greater than ‘XXXXX’

**Brochure request – Brochure name** in list ‘LeBoat Thames Guide (AUS),GER,LeBoat - Midi Guide,LB,LeBoat Midi Guide,LeBoat DVD,Connoisseur,LBE,LeBoat Thames Guide (NE),Crown Blue Line,Le Boat - GBP,Norfolk Broads,CLB,CBL,Guide Canal du Midi,Le Boat - Midi Guide,Hotel Barges,LeBoat Thames Guide (US),Le Boat,LeBoat Thames Guide (SE),Le Boat 09,Emerald Start,Emerald Star,LeBoat Thames Guide (ZAF),LeBoat Thames Guide (GBP)’

Possible change:

Brochure Name must be any of the above

OR

Brochure Type = ‘ESL,FS13,GER,LB,LB18,LBC,LBCA,LBMG,LBTG,MG,TG,CBL’

*Output fields*

Brochure request - Language

Brochure request – Date requested

Brochure request – Client code

Brochure request – Brochure name

Client – Title

Client – First name

Client – Last name

Client – city

Client – county

Client – Postcode

Client – Country

Client – email1

Client – deceased

Client – blacklisted

Client Preferences – cancel from mailing

Client preferences – cancel from email

*Steps*

1. Extract data from Boxi
2. Add brand name column and populate with ‘Le Boat’
3. Sort by date requested, latest to earliest
4. Convert the date field to american format
5. Sales office. Created from Sil’s look-up table:

(CRM - Lookup Table - LB - Bro Req Enews - Country-Lang=Bkg Office v04.xlsx)

* 1. First of all clean up country name – look up against columns B-C.
  2. Then combine Country and Language fields and lookup up against columns F-G in Look-up to provide the Sales office name

1. Dedupe the list by email address
2. Remove the blank email address row
3. Look up against ‘Cancel from email’ flag from Neptune, if found change ‘cancel from email’ flag in output to ‘Y’
4. Look up against Cheetahmail ‘unsubscribe’ list and if found change ‘cancel from email’ flag to ‘Y’
5. Any other records not found in steps 8) & 9) above, set ‘cancel from email’ flag to ‘N’
6. If ‘Cancel from mailing’ flag is blank, set to ‘N’
7. Map fields and upload to HubSpot

**eNews sign ups** (same table as brochure requests)

*Conditions*

**Client - Blacklisted** not in list ‘Y’

**Client - Deceased** in list ‘N’

**Client - Lead** in list ‘Yes’

**Brochure request – Date requested** greater than ‘XXXXX’

**Brochure request – Brochure name** in list ‘LeBoat Enews NL-EN-EUR,LeBoat Enews SE-FR-EUR,LeBoat Enews UK-EN-GBP,LeBoat Enews SE-ES-EUR,LeBoat Enews NE-EN-EUR,LeBoat Enews IE-EN-EUR,LeBoat Enews US-ES-USD,LeBoat Enews US-EN-USD,LeBoat Enews SE-EN-EUR,LeBoat Enews SE-IT-EUR,LeBoat Enews AU-EN-AUD,LeBoat Enews NL-NL-EUR,LeBoat Enews SA-EN-RAN,LeBoat Enews NE-DE-EUR,LeBoat Enews US-FR-USD,LeBoat Enews US-AM-USD’

Possible change:

Brochure Name must be any of the above

OR

Brochure Type = ‘LBE’

*Output fields*

Brochure request - Language

Brochure request – Date requested

Brochure request – Client code

Brochure request – Brochure name

Client – Title

Client – First name

Client – Last name

Client – city

Client – county

Client – Postcode

Client – Country

Client – email1

Client – deceased

Client – blacklisted

Client Preferences – cancel from mailing

Client preferences – cancel from email

*Steps*

1. Extract data from Boxi
2. Add brand name column and populate with ‘Le Boat’
3. Sort by date requested, latest to earliest
4. Convert the date field to american format
5. Sales office. Created from Sil’s look-up table:

(CRM - Lookup Table - LB - Bro Req Enews - Country-Lang=Bkg Office v04.xlsx)

* 1. First of all clean up country name – look up against columns B-C.
  2. Then combine Country and Language fields and lookup up against columns F-G in Look-up to provide the Sales office name

1. Dedupe the list by email address
2. Remove the blank email address row
3. Look up against ‘Cancel from email’ flag from Neptune, if found change ‘cancel from email’ flag in output to ‘Y’
4. Look up against Cheetahmail ‘unsubscribe’ list and if found change ‘cancel from email’ flag to ‘Y’
5. Any other records not found in steps 8) & 9) above, set ‘cancel from email’ flag to ‘N’
6. If ‘Cancel from mailing’ flag is blank, set to ‘N’
7. Map fields and upload to HubSpot

Notes:

* Lookup tables are updated in the confluence. If you don’t find them there please let us know.
* Cancelled bookings are not uploaded within the most recent or first bookings fields, only the ‘most recent cancellation’ fields
* The procedure outlined above may have been changed from the time this document was sent to the developer.