

Odyssey Use Case Mail Merge for Business

Pantheon's Odyssey Digital Automation Platform tackles the problems of integration, scheduling, routing, approvals, reporting and auditing. Odyssey brings together your existing applications, operating systems, databases in new and exciting ways, and it makes complex interactions faster and more consistent.

This document contains a real-world Use Case of how our customers have used Odyssey to extend their capabilities, bring speed and precision to their work, and allow employees to get more done in less time.

Mail Merge for Business

A customer wanted a way to keep in touch with its customer base, but not bog down the customers with inappropriate “spam” emails. A workflow was created to filter the customer, and send templated emails to the right customers.

The Marketing Assistant or Customer Support selected a group of customers based on filters for product ownership categories, or regional categories, or manual selection. The Marketing Assistant or Customer Support then selected the email template in the system. These email templates were based either on a raw text format, or an HTML format providing support for images and CSS formatting. Some email templates provided space for customized content, while other templates were rigid with little-to-no customizable content.

Some templates require managerial approval. The Marketing Assistant or Customer Support would assemble the mailing list and customize the content, and then Submit the mailing for approval. The system would email the manager with the mailing list and the content of the mail as it would appear to the recipients. The Manager could then approve or reject the email. If approved, the system sent the emails. If rejected, the Manager supplied a reason, and the system would notify the Marketing Assistant or Customer Support of the rejection and reason. The Marketing Assistant or Customer Support could then edit the email as appropriate and try again.

The system could also send the emails on a set schedule. In which case, the system handled it as above, the Marketing Assistant or Customer Support also designated a date and time for the system to send the email.