

Transaction documents

Transaction documents in marketing are used to record the exchange of products or services between companies and customers. Transaction documents can take various forms, including invoices, delivery notes, confirmations, receipts and warranty cards.

These documents play an important role in marketing, as they not only serve as legal proof, but can also be used as a marketing tool to strengthen brand image and promote customer relationships.

By integrating the brand logo, company name and design elements, transaction documents can represent the company and at the same time strengthen customer confidence.

An example of the use of transactional documents in marketing is the inclusion of a company logo and an advert on invoices to communicate the brand image.

Booking options

- | | | |
|----------------------|--|---|
| ✗ Demo booking tool* | ✗ Programmatic advertising | ✗ Marketing portals, Marketing automation platforms |
| ✗ Service provider | ✗ Self service tool, media buying platform | |

Media segment

- | | | |
|----------------|------------------------------------|----------------------|
| ✗ Internet | ✗ Out of home, digital out of home | ✓ Household, office |
| ✗ E-commerce | ✗ TV, cinema, moving image | ✗ Internet of Things |
| ✗ Social media | ✗ Radio, audio | |
| ✗ Mobile | ✓ One-to-One | |

Media type

- | | | |
|-----------|---------|------------|
| ✓ Digital | ✓ Print | ✓ Analogue |
|-----------|---------|------------|

Target group

- | | | |
|------------------------|------------------------|------------------------|
| ✓ Business-to-Business | ✓ Business-to-Consumer | ✗ Business-to-Employee |
|------------------------|------------------------|------------------------|

Marketing objective

- | | | |
|---|------------------|------------------------|
| ✓ Brand awareness, increased audience reach | ✓ Customer care | ✗ Employee recruitment |
| ✗ Lead generation, new customer acquisition | ✓ Sales increase | |

Customer Journey

- | | | |
|-----------------|-------------|------------|
| ✓ Awareness | ✗ Purchase | ✗ Advocacy |
| ✗ Consideration | ✓ Retention | |

Ad media

- | | | |
|--|--|-------------------------------------|
| ✓ Advertisement, Banner | ✗ Google Business Profile | ✗ Roof objekt |
| ✗ Advertorial | ✗ Influencer | ✗ Sales talks |
| ✗ Annual report | ✗ Landing-page, microsite | ✗ Self service terminal |
| ✗ Appointment calender | ✗ Location Based Service | ✗ Shopping cart |
| ✗ Audio, radio spot, audio file | ✗ Mobile payment systems | ✗ Sign, labelling |
| ✗ Augmented Reality | ✗ Newsletter | ✗ Social media advert |
| ✗ Beach flag, flag, roll-up | ✗ Newspaper, magazine, periodical | ✗ Social media company page |
| ✗ Book, E-book | ✗ NFC | ✗ Social media posting |
| ✗ Brochure, flyer, inserts | ✓ Offer, quotation | ✗ Social media profile page |
| ✗ Catalogues, price lists | ✓ Office equipment | ✗ Sponsoring |
| ✗ Chat, chatbot | ✗ Office files | ✗ Spontaneous event |
| ✗ Company entries | ✗ Operating instruction, user manual | ✗ Structured company data records |
| ✗ Configurator | ✗ Passers-by addressing | ✓ Survey |
| ✗ Contact form | ✗ Petrol pump nozzle | ✓ Telephone and video call service |
| ✗ Content SEO-optimised | ✗ Postcard | ✗ Unboxing |
| ✗ Credit card | ✗ Poster, billboard, pillar | ✗ V-card |
| ✗ Customer card | ✗ Product live demo | ✗ Video spot, moving image |
| ✗ Display, monitor, citylight, megalight | ✗ Product packaging, product labeling | ✗ Virtual Reality |
| ✗ Display stand, light box | ✗ Product sample | ✗ Virtual, voice assistant |
| ✓ E-mail, signature banner | ✗ Programmatic print | ✓ Vouchers, coupons, discount cards |
| ✗ E-paper | ✗ Promotional items | ✗ Web layer |
| ✗ Event | ✗ Push, text messages | ✗ White paper |
| ✗ Exhibition stand, event modules | ✗ Quality seal | ✗ WLAN for visitors |
| ✗ FAQ | ✓ QR code, link | |
| ✗ Games, competitions | ✗ Rental addresses, target group areas | |

Connected media channels

App (Brand, topic)
Call centre
Consulting, support, training
Customer loyalty programme
Delivery
Email, email newsletter
Extranet
Field sales force
Messenger
Online shop (Brand)
Point of sale (POS), Showroom
Product, service (Advertising medium)
Product, service experience

Reviews, recommendations

SMS

Website (Brand, topic)