

CUSTOMER PORTAL
Communications E-shot Guide

COMMUNICATIONS

The communications facility allows you to create custom email or SMS offers that can run from and to a specified date range, and be issued to visitors of your venue based on predefined parameters.

By selecting the type and then selecting the available defining parameters, you can target exactly who is rewarded with the offers. For example, parameters can be based on a user's gender, age demographic, the number of times they have visited one of your venues in a given time frame or their birthday, as well as the top 10, top 25 and top 50 customers. Historic User Matching allows you to see how many people your communication will currently reach based on the parameters you specify.

All communications that are distributed to recipients in the form of an email will be sent as one Jpeg image. This image is now clickable so the recipient can be sent to a URL predefined by the venue. This information is captured by the portal and the results are displayed in the campaign reports area if the campaign option is turned on. For sending communications a charge is applicable and so funds will need to be added to the portal before the communication can be sent.



CREATING A NEW E-SHOT TEMPLATE.

Create new template

1. To create a new communication, click the **Create new template** button located in the top of the right-hand corner of the window.
2. You will now be presented with a **Create your communication** window.

Create your communication

Template name

Template type E-shot

Parameter type Visit Based ?


Please select owner level

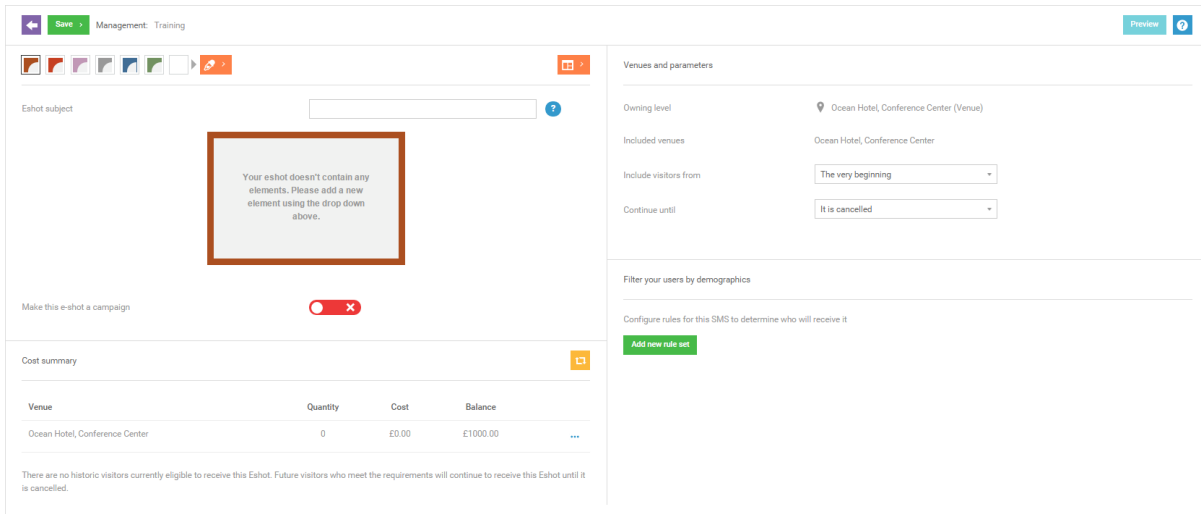
Ocean Hotel, Conference Center

Cancel Ok

3. Enter the template name.
4. Select **E-shot** from the **Template type** drop-down.
5. Select the **Parameter type**, these can be either:



- **Visit Based**
- **Dwell Based (Licence specific)**
- **Top Customers**
- **Birthday**
- **Online**
- **LogicFlow**

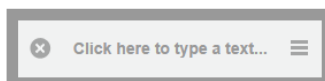
6. Once selected click the  button.
7. The management screen will appear; you can now start to build your communication. The screen is split into two areas, on the left is the area to create the content. On the right is the area which allows you define the parameters for sending. The area on the right of the screen will differ depending on the Parameter type.




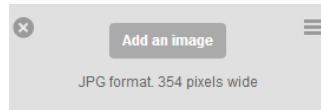
Venue	Quantity	Cost	Balance
Ocean Hotel, Conference Center	0	£0.00	£1000.00

There are no historic visitors currently eligible to receive this Eshot. Future visitors who meet the requirements will continue to receive this Eshot until it is cancelled.

8. Click the Insert a new module  icon.
9. Select the element you want to add from the list, you can add as many elements as required.
 - **Title** - ability to add text.
 - **Text** - ability to add text.
 - **Image** - ability to add a picture.
 - **Ribbon** - ability to add text.
 - **Date Range** - ability to add dates.
10. When an element has been added, it will appear at the top by default, you can then reposition this anywhere by clicking the drag handle  icon and dropping the field into its new position.




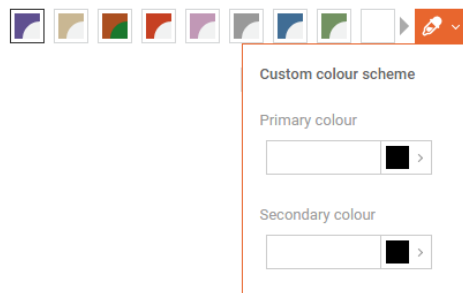
11. You can delete the element by pressing the  icon.
12. If you add an image to the image element, the required size and format is displayed to help when formatting the picture.



13. Once all the elements have been added you can then select the colour scheme for the e-shot by choosing from a selection of pre-defined colour themes located above the elements. Colour schemes are defined by:


- **The border colour** - Primary colours.
- **The 'fill' colour** - Secondary is for the elements.

14. You are also able to specify a custom colour scheme by clicking the  icon.




15. You can enter the e-shot subject by entering the details into the empty field box, if left empty the default subject "A message from Purple".

Eshot subject

16. Below the e-shot content is the option to make this e-shot a campaign, by default this option is turned off. To turn on click the toggle switch on to a green tick .

Make this e-shot a campaign 

17. The area will expand; you can now give the campaign a name and enter a URL.

Make this e-shot a campaign 



Campaign name


Campaign url

18. Once set this will allow recipients to click the e-shot and will be redirected to the URL you entered. A report will also be generated in the Campaign reports area specifically for this campaign and display the results.


COST SUMMARY

1. At the very bottom of the screen is the **Cost summary**, this will display the quantity of customers matching the criteria, the cost and your balance. There is also a fly out menu with one option to **add funds**.

Venue	Quantity	Cost	Balance	
Ocean Hotel, Conference Center	0	£0.00	£1000.00	 

- If you don't have enough funds available to send the communication but you still wish to send, you can add funds directly from this area. Hover you mouse over the fly out menu .

- The menu will expand and display the available options  .


- Click the  icon, this will take you to the add funds area where you can add the required funds to your account.

VENUES AND PARAMETERS.

- You will need to define parameters to determine who this e-shot goes out to. You can specify a range of criteria that must be met in order for a user to receive the communication you have created.
- Using the options on the right you can now define your parameters. The type selected initially will determine the defining parameter criteria. The level you are at in the portal will also determine what options are available.

- Visit Based** - Ability to define which venues must be visited, to and from date, if going to previous customer and how long to continue for.

Venues and parameters

Owning level  Ocean Hotels Worldwide Inc. (Company)


Included venues

Include visitors from

Continue until

- Dwell Based** - Ability to define how long it will run, which dwell region and the dwell time, apply to visitors during the last, 24 hours, 3 days, 1 week or 1 month. (Regions need to have been created in the floorplan analytics area of the portal before this communication type can be used correctly).

Venues and parameters

Owning level  Ocean Hotel, Conference Center (Venue)

Continue until

Visitors in the past

Who dwelled within

Minimum dwell time Minutes

- **Top Customers** - Can send to the top 10, top 25 and top 50 customers. The list of recipients will be displayed at the bottom of the screen. You can exclude names if required by unticking the include box.

Venues and parameters

Owning level Ocean Hotel, Conference Center (Venue)

Included venues Ocean Hotel, Conference Center

Send to Top 10

Filter your users by demographics

Configure rules for this SMS to determine who will receive it

[Add new rule set](#)

Recipients for your message 13

Name	Gender	Age	Last visit	Visits	Include
Jay-Z	M	46	2016-03-01	27	<input checked="" type="checkbox"/>
Randa	F	32	2016-03-03	25	<input checked="" type="checkbox"/>
Magnus	M	41	2016-03-01	25	<input checked="" type="checkbox"/>
James	M	37	2016-03-03	24	<input checked="" type="checkbox"/>

- **Birthday** - Uses available dates of birth (customer would need to have provided their date of birth when authenticating on the system) and can specify if it will go out 1 day, 1 week or 2 weeks before their birthday. There is also an option to send a standard communication on their actual birth.

Venues and parameters

Owning level Ocean Hotels Worldwide Inc. (Company)

Included venues Select venues

Continue until It is cancelled

Dates of birth found 0 users

Send before birthday 1 Day before

Send on their birthday. ☐

- **Online now** – You can send to any users currently in the venue right now, once the venue is selected the system will display the users currently online.

Venues and parameters

Owning level Ocean Hotel, Conference Center (Venue)

Use venue Ocean Hotel, Conference Center

Users currently online 0

- **LogicFlow** - Will have no parameters to set as these will all be done within the LogicFlow itself. If at company level you can still select which venues to include.

Venues and parameters

Owning level Doms Portal Training (Venue)

Included venues Doms Portal Training

Continue until It is cancelled

3. The first option to select is the **Include visitors from**, click the drop-down menu and select an option, these are:
 - **Do not send to past visitors** – If this option is selected the cost breakdown will disappear as no communication will be sent to previous customers.
 - **The very beginning** - This will send to any customers who have visited the venue previously and meet the criteria set.
 - **The following date** – this will open a field box with a calendar icon allowing you to select the required date.
4. Next, you need to set the **Continue until** option, again click the drop-down menu and select an option. These are:
 - **Do not send to future visitors** – This setting only allows the communication to go to previous customers and no new customers from this point forward.
 - **It is cancelled** – The communication will continue to be sent out to visitors matching the criteria until you cancel.
 - **The following date** – this will open a field box with a calendar icon allowing you to select the required date.
5. You can now set Filters so that the communication will only go to specific demographics, the filters will differ depending on your communication type and some will not have the option to filter. The filters are:

Visit Based

1. The first drop down will allow you to select either:
 - **Age**
 - **Gender**
 - **Visits**
 - **Has visited**
2. The next drop down will change depending on the first selection.
 - **Age**
 - Is
 - Is not
 - Within range
 - Less than
 - Less or equal to
 - More than
 - More or equal to
 - **Gender**
 - Is
 - Is not
 - **Visits**
 - Is
 - Is not
 - Within range
 - Less than
 - Less or equal to
 - More than
 - More or equal to
 - **Has Visited**
 - On
 - Between
 - Before
 - After

Dwell Based

The drop down will allow you to select either:

- **Age**
- **Gender**

Top Customers

The drop down will allow you to select either:

- **Age**
- **Gender**
- **Last Visit**
- **Has Visited**

Birthday

The drop down will allow you to select either:


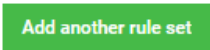


- **1 Day before**
- **1 Week before**
- **2 Weeks before**

Online Now


This has no ability to filter.


LogicFlow

This has no ability to filter.

3. Once you have selected the first rule you can either add another element to this rule set using the **AND** option. This means both rules must be met for the criteria to match and send out the communication.
4. Click the  button and add the new rule.
5. You can also create another rule set as an **OR** option, this means either the first rule set or the second rule set can be matched for the communication to be sent.
6. Click the  button and select the information following the instructions above.
7. Once all is completed, you can then preview the communication before saving.
8. Click the **Preview**  button, located at the top right of the screen. **(Eshot only)**
9. The content will change on screen to show how the e-shot will display for the recipient, leaving out any elements containing no data.
10. If further amendments are required click the  button.

STATUSES AND PUBLISHING

1. By default, new templates will have an **In Development** status. This means you can build and tweak your content and parameters before committing to your settings and sending the communication to any recipients.
2. Click the  button in the top right hand corner; this will publish your communication live and change its status to **Published**. At this point your communication is locked and you will no longer have the ability to edit details or change parameters, although you can still duplicate this template.


- The following message will appear on screen advising of the above, click the  button to proceed.

Are you sure you want to publish this voucher? After publish you will not be able to make changes

Cancel
OK

- Once published, if Historic User Matching is enabled, it will automatically be sent to any user matches currently in the database. The number issued is displayed on the main screen on the right of the published template.

Template name	Type	Date created	Published	Valid from	Valid to	Status	No. issued
Holiday discount	Visit Based	27/03/2015	-	-	-	In Development	-

- You can click on No. issued and it will break down and list all the recipients.
- Published templates can be cancelled at any point by hovering over the fly out menu and selecting the  button. A window will open advising that once deleted, it will no longer be available. Once deleted, it will be removed from the 'Your Templates' area but you can duplicate the template beforehand to use content again in the future.

Delete e-shot

Are you sure you want to delete this e-shot?

Cancel
OK

EDITING 'IN DEVELOPMENT' TEMPLATES.

- In development e-shots are listed at the bottom of the e-shots module below the system templates.

Your templates

System templates

< >


Your e-shots

Create new template ?

Template name	Type	Date created	Published	Valid from	Valid to	Status	No. issued
Holiday discount	Visit Based	23/12/2014	-	-	-	In Development	-

- Click on the title in the left-hand panel and the chosen communication will be loaded. You can now make amendments as required

SETTINGS (Eshot only)

- Clicking the setting icon  will allow you to setup a custom email, once set all marketing will be sent from this email address.

- First switch on by clicking the  icon.

3. Enter the email address.

4. Click the  button.

E-shot email

If set, all e-shots will be sent from this email address

USING A SYSTEM TEMPLATE (Eshot only)

There is only one system template which is the Birthday venue invite and this is only an Eshot. You are able to use any previously created communications as a template.

Your templates





System templates


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System template

Template name	Description
Birthday invite	Encourage your visitors to come to your venue on their birthday

1. To use a system template or an existing e-shot as a template, hover your mouse pointer over the  icon, the following will appear .

2. Click the preview  button to preview the e-shot first.

3. Click the duplicate  button to use this template.

4. A **create your e-shot** box will appear.

5. Enter a name for this e-shot.

6. Select the e-shot type and click proceed.

7. The e-shot template will load with a birthday theme and the content already created. You can now either alter, delete or add further content if required.

MY FUNDS (Account Management – My Account)

This will display any funds available to use for sending SMS communications, recent transactions, the ability to add additional funds and also setup alerts to notify when funds are running low.

My details

My funds

Recent transactions

Funding allocations

Ocean Hotel, Conference Center

Deposited funds this month

£0.00

Funds allocated this month

£750.00

Available balance

£748.23

Notify of low funds

Add funds

Recent transactions

Date	By user	Description	Amount
27/07/2015	System	SMS sent to 1 visitors, message le...	-£0.03
27/07/2015	System	SMS sent to 1 visitors, message le...	-£0.03
27/07/2015	System	SMS sent to 1 visitors, message le...	-£0.03
27/07/2015	System	SMS sent to 1 visitors, message le...	-£0.03

1. To add funds, click the **Add funds** button.
2. The following window will open:

Add funds to your account **Make purchase**

Which account would you like to credit funds to?

▼ Ocean Hotels Worldwide Inc.

Ocean Hotel, Conference Center

▼ America

Ocean Hotel, Santa Maria

Ocean Hotel, Santa Barbara

How much would you like credit the account with?

Amount to credit

Currency GBP ▼

3. You need to select which account to credit the funds to, what is displayed here will depend on your login credentials.
4. Now select the amount you wish to credit to the account.
5. Select the currency from the drop-down menu.
6. Click the **Make purchase** button.
7. The following window will open:

venuewifi

Step 1 of 2 - Personal & Address details


<p>Gender ▼</p> <p>First name Iain</p> <p>Last name Jewitt</p> <p>D.O.B DD ▼ MM ▼ YYYY ▼</p> <p>Telephone 0</p> <p>E-mail iain@purple.co</p>	<p>Street </p> <p>Suburb </p> <p>City </p> <p>Postcode </p> <p>Country United Kingdom ▼</p>
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Cancel
Continue

8. You will need to complete both steps. The first step is your details, once completed Click **Continue**.
9. Complete step 2 which is your payment details.
10. Once you have completed both steps you will be taken back to the Funds tab and your new deposit will be displayed. The recent transactions area will also update.
11. To set an alert to notify you of low funds click the **Notify of low funds** button.
12. The following window will open:

Subscribe to low fund notifications

Email addresses



Notification amount

Cancel

Save

13. You can now enter the relevant details, these are:

- An email address for the notification to be sent to.
- The notification amount, how low funds get before the notification is sent.