

CUSTOMER PORTAL
SMS Communications 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.



CREATING A NEW SMS 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 portal.
2. You will now be presented with a **Create your communication** window.

Create your communication

Template name

Template type SMS

Parameter type Visit Based

Please select owner level

☒ Ocean Hotels Worldwide Inc.

☒ America

☐ Ocean Hotel, Santa Barbara

☐ Ocean Hotel, Santa Maria

☐ Ocean Hotel, Conference Center

Cancel OK

3. Enter the template name.
4. Select **SMS** from the **Template type** drop-down (Eshot is set as the default).

5. Select the **Parameter type**, these can be either:

- **Visit Based**
- **Dwell Based (Licence specific)**
- **Top Customers**
- **Birthday**
- **Online Now**
- **Logic Flow**

OK

6. Once selected click the button.

7. The management screen will appear; you can now start to build your SMS. The screen is split into two areas, on the left is the area to add the content. On the right is the area where you can define the parameters for sending.

Marketing > Communications
Training

Return to library Save ⓘ

Message content

Enter your message...

Character count: 0 SMS count: 1

Owning level Ocean Hotels Worldwide Inc. (Company)

Included venues Select venues

Include visitors from The very beginning

Continue until It is cancelled

Filter your users by demographics

Configure rules for this SMS to determine who will receive it

+ Add new rule set

Summary

Venue	Visitors
Ocean Hotel, Conference Center	151
Ocean Hotel, Santa Maria	101
Ocean Hotel, Santa Barbara	72

ⓘ The table shows how many messages will be sent and the cost to each venue when this SMS is published.

ⓘ Future visitors who meet the requirements will continue to receive this SMS until it is cancelled.

8. Now enter the message content, you are able to insert URLs within this area. When you start typing the message the character count will start to increase, it will also display the number of SMS needed for the communication to be sent. Once you have reached 160 characters you will need to use 2 SMS and so on.

SUMMARY

At the very bottom of the screen is the **Summary**, this will display the quantity of customers matching the criteria and the cost to send. Depending on the login level, there may be multiple venues listed if at group or customer level.


Summary

Venue	Visitors
Ocean Hotel, Conference Center	151
Ocean Hotel, Santa Maria	101
Ocean Hotel, Santa Barbara	72

VENUES AND PARAMETERS.

1. You will need to define parameters to determine who this e-shot goes out to. You can set a date range, target previous customer or future customer or both
2. Using the options on the right you can now define your parameters. The login level and SMS type will also determine what options are available. If any of the options are changed, the summary will update for each change.
 - **Owning Level** – This will be set when you first create the SMS, it shows at which level this is created and accessible.
 - **Included Venues** – If created at venue level this will just display that venue. But if created a company or group level it will display a drop down where you can select the required venues to be included.
 - **Include Visitors From** – By default set to **The very beginning** but a drop down to change if required. The options available are:
 - Do not send to past visitors
 - The very beginning
 - The following date (an additional box will appear to enter the required date)
 - **Continue Until** – By default set to **It is cancelled**, but a drop down to change if required. The options available are:
 - Do not send to future visitors
 - It is cancelled
 - The following date (an additional box will appear to enter the required date)

Venues and parameters

Owning level	 Ocean Hotels Worldwide Inc. (Company)
Included venues	<div>Select venues ▾</div>
Include visitors from	<div>The very beginning ▾</div>
Continue until	<div>It is cancelled ▾</div>

FILTER BY DEMOGRAPHIC

1. You can set rules that must be met in order for the communication to be sent but you can leave blank, this will then go out to all. The Filtering will differ depending on the SMS type selected initially.
 - **Visit Based** - Ability to define which venues must be visited, the number of visits, age or gender. Ideal for a loyalty scheme.
 - **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** – Ability to define how long it will run, which dwell zone 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).


Visitors in the past	24 Hours ▼
Who dwelled within	Please select a zone ▼
Minimum dwell time	30 Minutes ?

Ability to Filter by:

- **Age**
 - Is
 - Is not
 - Within range
 - Less than
 - Less or equal to
 - More than
 - More or equal to
- **Gender**
 - Is
 - Is not
- **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 Hotels Worldwide Inc. (Company)

Included venues

Select venues ▾

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 

Name	Gender	Age	Last visit	Visits	Include
Jay-Z	M	49	2018-06-04	27	
Randa	F	35	2018-06-29	25	
Magnus	M	44	2018-06-04	25	

Ability to filter by:

- **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
- **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 ▾

Continue until ▾


Dates of birth found 0 users

Send before birthday ▾

Ability to filter by:

- **1 Day before**
 - **1 Week before**
 - **2 Weeks before**
- **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 Hotels Worldwide Inc. (Company)


Use venue ▾

Users currently online 14

No ability to filter

- **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

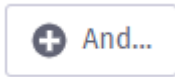
Owning level  Ocean Hotels Worldwide Inc. (Company)

Included venues ▾

Continue until ▾

 **Add new rule set**

2. To add a filter, click the button. The first drop down will appear with the available filters for the SMS type you selected.
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.

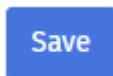


- Click the button and add the new rule.
- You can also create another rule set as an **OR** option, this means either the first rule set or the second rule set can be matched for the communication to be sent.



- Click the button and select the information following the instructions above.
- Once all is completed, you can then preview the communication before saving.

SAVING



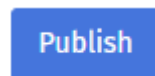
- To save the details, click the button.
- A drop down will appear:
 - Save Changes** – This will save the communication.
 - Reset** – Reset to defaults and removes any added information.
- You can now either:
 - This will not publish the communication but take you back to the template screen. As long as you clicked save it will now appear under the **Your Templates** area with an **In Development** status. Clicking back on the name will re-open the edit screen.
 - Will publish the communication and send out straight away or at a later date depending on the defining criteria selected.

STATUSES AND PUBLISHING

- 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.



- 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 SMS?

When published you will not be able to make any further modifications. Please review the information below before you proceed.

Cancel
Publish

- 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.

- You can click on No. issued and it will break down and list all the recipients.

- Published templates can be deleted at any point by clicking the fly out menu and selecting the  **Delete** option. 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 Communication

Are you sure you want to delete this communication?

Cancel
Delete

EDITING 'IN DEVELOPMENT' TEMPLATES.

- In development e-shots are listed under **Status** in the Your templates area.

Your current templates						Create new template Settings 
Template name	Type	Created	End date	No. sent	Status	
Training	SMS Visit Based	12/12/2018	Until cancelled		● 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