CRM 2015

E-COMMUNICATIONS VERSION 5 & FLOWS USER GUIDE

green4 SOLUTIONS

THE QUEEN'S AWARDS FOR ENTERPRISE: 2014

CONTENTS

ABOUT THIS DOCUMENT

This document has been prepared as a User Guide for eCommunications 5 and Flows.

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DOCUMENT CONTROL

Version	Date	Change	Initials
V1.0	12/05/2015	This is a new document	JW
V1.1	30/06/2015	Information on Link Types added Information on Social Media Optimization added	JW
V1.2	28/07/2015	MR Updates	JW
V1.3	06/10/2015	Flows section added	JW
V1.4	26/10/2015	Changed documents name to e-Communications 5 & Flows User Guide	

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ECOMMUNICATIONS 5 & FLOWS- AN INTRODUCTION

ECommunications remains the best digital marketing channel for ROI according to the econsultancy 2014 email census. With the very latest eCommunication 5 module from Go, communications can be built effortlessly whilst also remaining highly professional. With the growing use of multiple devices eCommunication 5 offers responsive layouts so that all communications can be viewed over a range of devices.

ECOMMUNICATIONS 5

Having the ability to create eCommunications campaigns within CRM directly enables users to utilise the full power of the data that sits within CRM. A further strength of Go's eCommunications system is the ability to target communications to audience members, ensuring only relevant materials are issued and that these materials are personalised for the recipient.

New drag and drop functionality within the Comm Creator makes it easier than ever before to design the perfect communication within the free bespoke responsive layouts that eCommunications 5 offers.

Upon publishing a communication via the Comm Creator it is also possible to review its performance so that essential feedback and data can then be analysed, ensuring that the next communication that is produced can always be more effective than the last.

Go has also developed Flows meaning that it is possible to effortlessly create powerful sequences of automated communications that use the CRM data to deliver a targeted message right on queue. Flow Triggers can be simply dragged and dropped into place and automations can be triggered by a vast number of actions within the system, from making a booking to a birthday. Emails can also be triggered by the flow, which can be set to deliver either before, on, or after a key date.

Marketing Lists and Communication Audiences are used to target audiences who are to receive communications. Marketing Lists can be added as rules to the communication so that all contacts within them can be targeted. Although a new Communication Audience can be created within the Comm Creator it is also possible to create one before setting up the communication as it can be simply added once in the Comm Creator.

This document will demonstrate how eCommunications 5 from Go can be used to quickly and effectively create a communication.

COMMUNICATION AUDIENCES | MARKETING LISTS | COMMUNICATION SETTINGS | COMM CREATOR | FLOWS

COMMUNICATION AUDIENCES

Communication Audiences are built using a set of predefined Audience Rules; these are set up in order to easily segment large portions of the database, based upon criteria such as email address, bookings, fixtures, communications received, etc.

Communication audiences allow the end user to easily collate a number of contacts with the end goal of communicating to them through email.

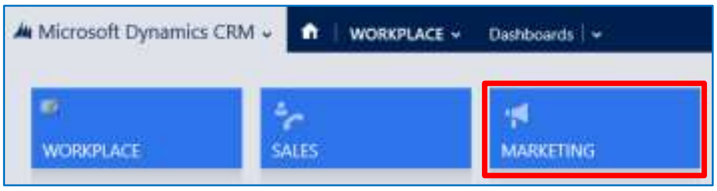
The rules governing Communication Audience memberships are dynamic. This means that the audience members will update when the data does. For example if an audience rule is in place to add Contacts with all email addresses, whenever a new contact is added to the database - with an email address, the contact will automatically become a member of this audience.

There are also two "silent rules" automatically running on all Communication Audiences. These are the removal of inactive contacts and the removal of unsubscribed contacts, increasing the effectiveness off your audience.

Although new Communication Audiences can be built within the Comms Creator it is also possible to add an already existing Communication Audience to the Comms Creator.

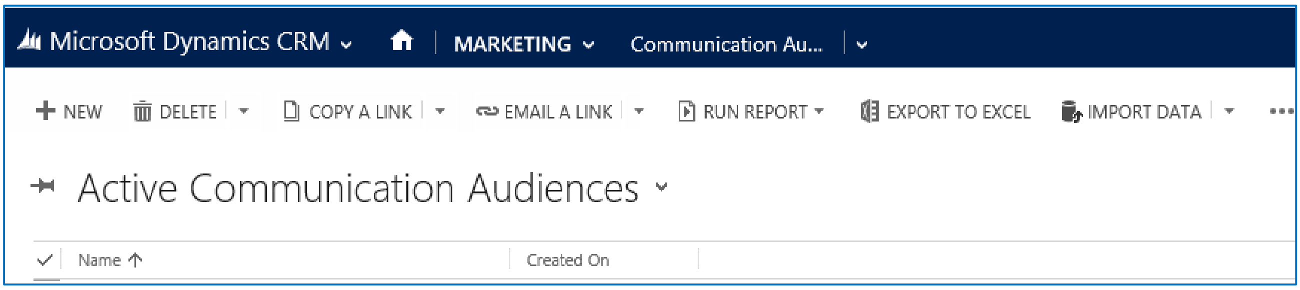
Below is a step by step guide to creating a Communication Audience:

a) Select the **Microsoft Dynamics CRM** tab and from the drop down select **Marketing** in the navigation area.

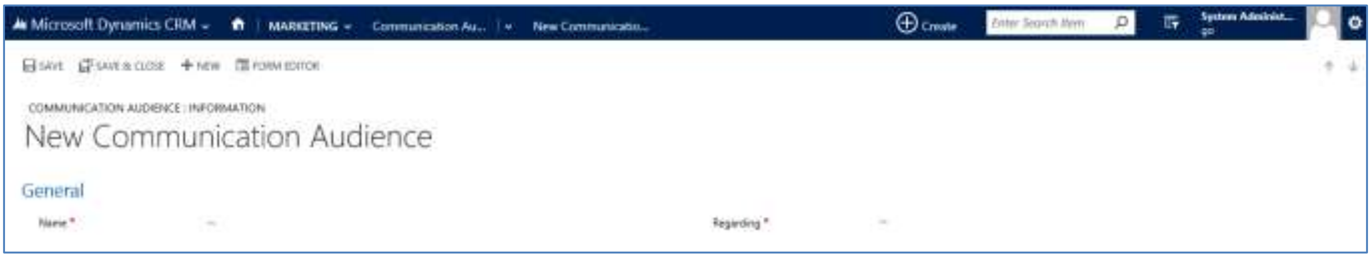


b) In the navigation area select the **Marketing** tab from the drop down before scrolling across and choosing **Communication Audiences.**

c) A list of any currently Active Communication Audiences will be displayed, select **New** on the ribbon.



d) A New Communication Audience form will be displayed. Complete the following fields:



- **Name.** Enter the name of the Communication Audience.
- **Regarding.** From the drop down list choose what entity the communication is about/regarding. This will typically be contact.

e) Upon completing these fields when creating a New Communication Audience, the rules area will appear. This is where the rules which will govern who the communication is to be sent to must be added. Rules are used to determine who the audience are.

f) There are different types of rules that can be added to the Communication Audience depending on which icon is selected, however it must be noted that all communications must begin with an Add rule being inserted:

- The green **Add** button can be used to add rules that will add audience members (These being contacts, accounts or leads) to the audience, for example Add all contacts with a valid email

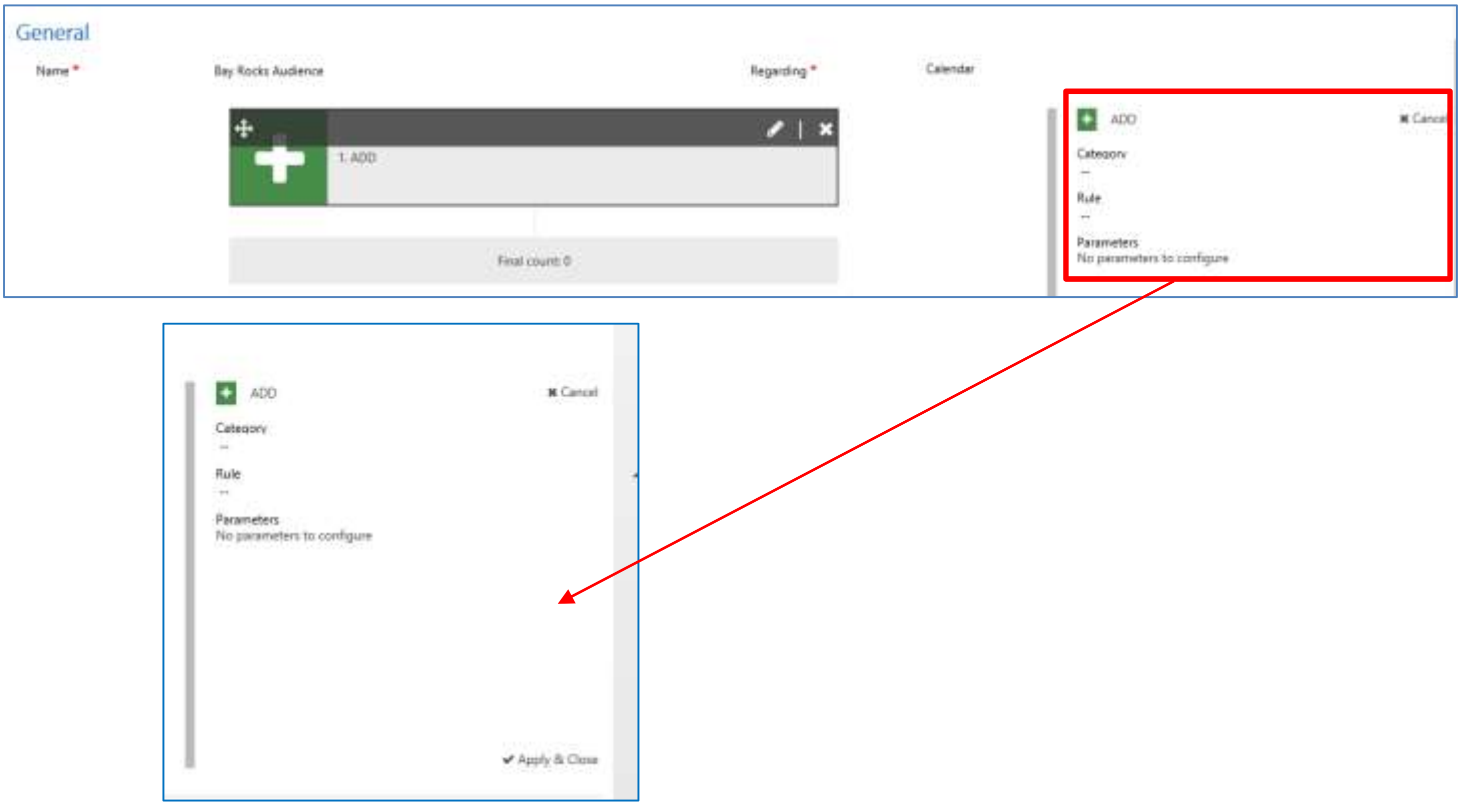
- The orange **Keep** button can be used to keep certain audience members within the audience, for example keep contacts aged between 21 and 30. Those not within this age will be removed from the audience.

- The red **Remove** button can be used to add rules that will remove audience members from the audience, for example remove contacts who have ‘Male’ as the gender.

g) To add a rule, drag and drop the relevant rules icon into the rules area.

h) After dragging and dropping the relevant rule icon into the rules area, it will then be possible to choose the **Category** and **Rule** of the Audience Rule in the editing pane.

There is a huge range of rules available that can be added but depending on the rule icon that has been dragged and dropped into the rules area (Add, Keep or Remove Icon) the Category and Rules that can be selected will differ.

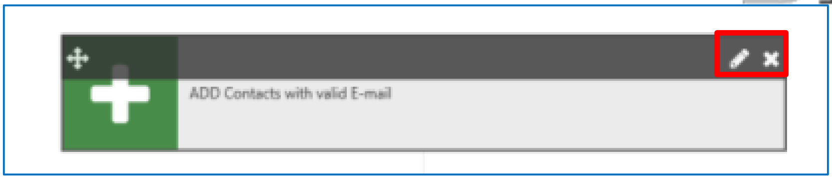


- **Category.** Choose a Category from the drop down list. The Category that is chosen will enable certain Rules to be chosen.
- **Rule.** Depending on which Category has been selected a list of rules will be displayed from the drop down.
- **Parameters.** This field will only need to be completed for certain rules that have been chosen. For example if a Category of Booking-Channel is chosen with a Rule of Contacts who booked through channel X the Parameters fields would have to be completed to select the correct Channel.

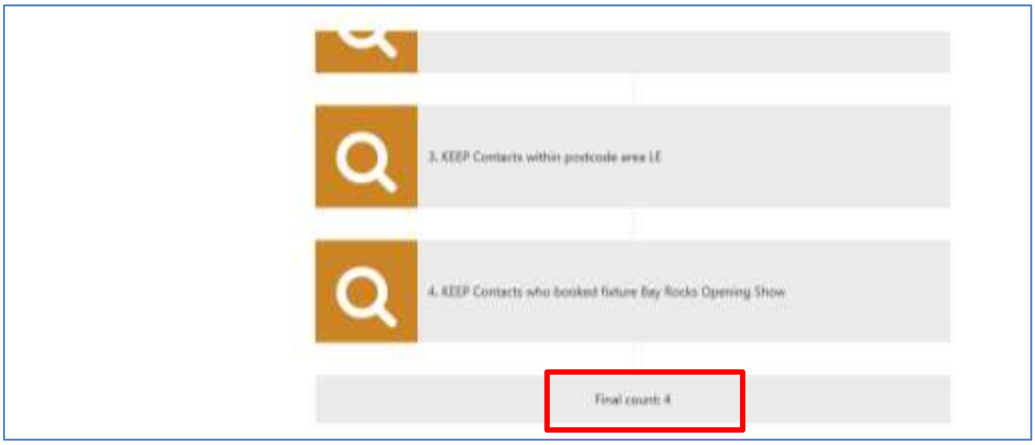
i) Select **Apply & Close** in the editing pane, repeat the above steps of adding a rule until all the relevant rules have been added to target an audience.

Note. The rules operate in a sequence. It is possible to change the sequence of the rules by dragging them up and down. The rule at the top of the sequence will be the first that is applied to target an audience with each rule that sits beneath it working in order to segment who the communication will be sent too.

j) It is possible to edit or remove a rule once it has been added. To edit a rule hover over it and choose the pencil icon, this allows the rule to be then edited. To delete a rule, hover over the rule and choose the cross.



k) It is also possible to see the Final Count of the audience and as new rules are added this count will continuously update to demonstrate the quantity of the audience.



Note. Marketing Lists can be inserted as an Add rule as can be seen below. This can enable all members of a Marketing List to be added to build up an audience.

l) Upon adding all of the rules, select **Save and Close** in the ribbon.

MARKETING LISTS

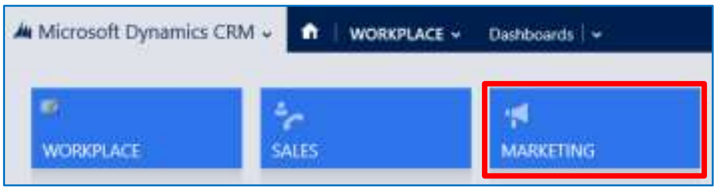
The Marketing List option allows you to create either a static or dynamic list of contacts, accounts or leads. Marketing Lists are often described as being super targeted, as it is easy to choose the exact contacts who will be contained within them.

A **dynamic** Marketing List will update whenever the data in CRM does. For example, if a dynamic Marketing List is set up containing all contacts with an email address, if there was then an import of 5,000 additional contacts with email addresses – they would automatically be added to the Marketing List. It must be noted that although dynamic Marketing List can be created, they cannot be used in eComms 5.

Static Marketing Lists work in the opposite way. When the group has been created, they will not update, regardless of whether or not the data in CRM does. The contacts within a Marketing List can be added to build up an Audiences within the Comms Creator.

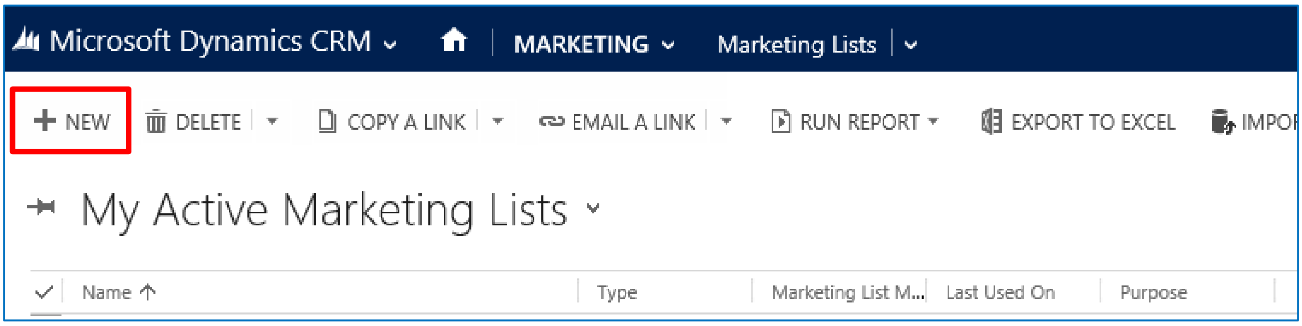
To create a new Marketing List, complete the following:

a) Select the **Microsoft Dynamics CRM** tab and from the drop down select **Marketing** in the navigation area.

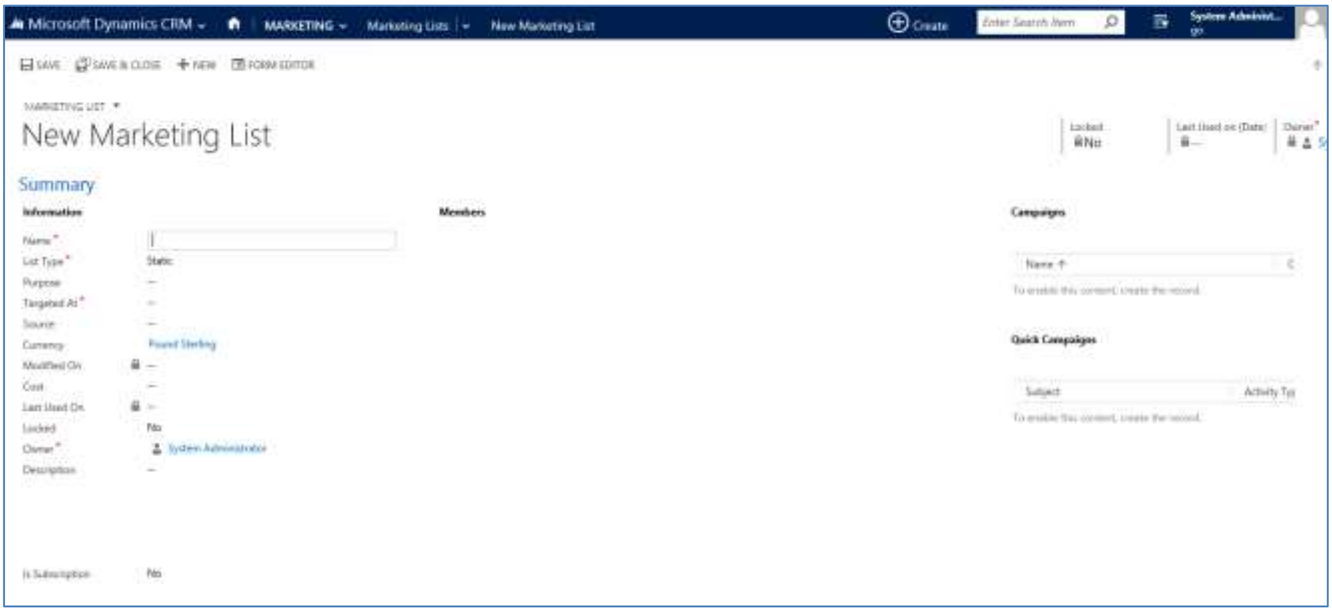


b) In the navigation area select the **Marketing** tab from the drop down before choosing **Marketing Lists.**

c) A list of any Active Marketing Lists will be displayed, select **New** in the ribbon.



d) A new Marketing List will be displayed, complete the following details:

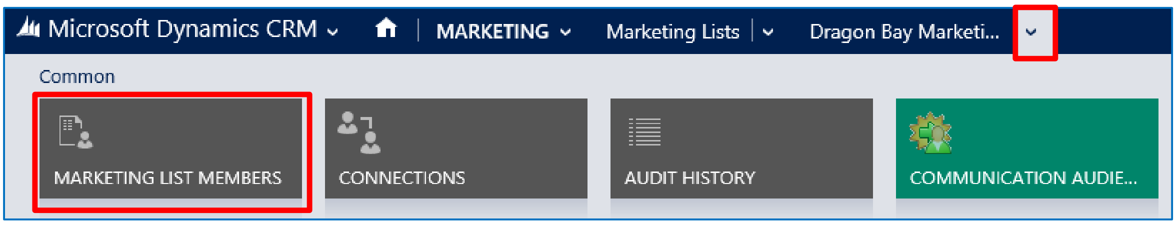


General

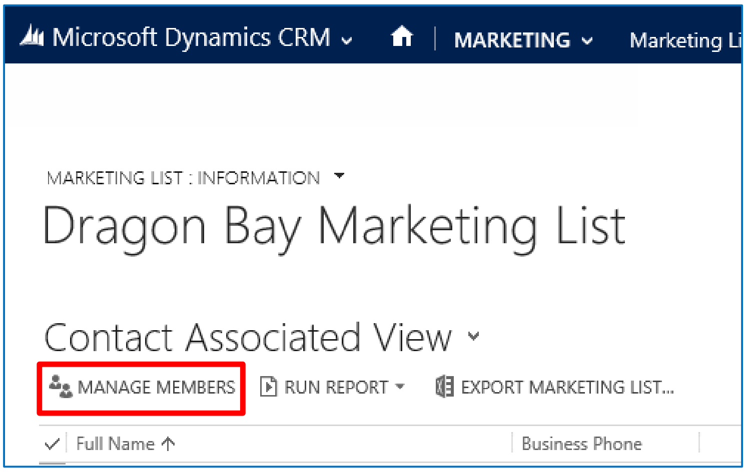
- **Name.** Enter the name of the Marketing List
- **List Type.** Select if the Marketing List is to be either Static or Dynamic. By selecting Static this will mean that once a query is run and members added to a Marketing List – they will not update, regardless of whether or not the data changes. Dynamic is the opposite of this and will mean that the Marketing List will update when the data within the system changes.
- **Purpose.** Enter the purpose of the Marketing List.
- **Targeted At.** Select from the drop down who the Marketing List is to be targeted at, choose form Contacts, Lead or Account.
- **Currency.** The default currency will already be displayed in this field.
- **Modified On.** This field is locked and will automatically update.
- **Last Used On.** This field is locked and will automatically update.
- **Locked.** Select **Yes** if the Marketing List is to be locked.
- **Owner.** The owner of the Marketing List will automatically be displayed, however if applicable this can be changed by selecting the lookup.
- **Description.** Enter a description of the Marketing List.
- **Is Subscription.** Select **Yes** if Contacts who are part of the Marketing List will become subscribed to Communications that are sent to the Contacts within it. This functionality is a method for subscribing users to different communication themes such as family alerts, offers or events. The Marketing List will also appear in the Communications Portal.

e) Select **Save** on the ribbon, the Marketing List Members will then need to be added to the Marketing List.

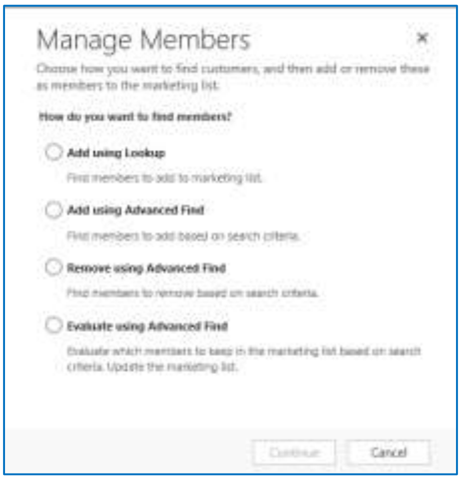
f) To add the Marketing List members, select the small arrow next to the name of the Marketing List before choosing **Marketing List Members** from the drop down.



g) A Contacts Associated View will be displayed, select **Manage Members** in the ribbon.



h) The Manage Members dialogue box will appear. This is where it is possible to choose the criteria of the Marketing List members or alternatively individually select them. Choose from one of the following options to find the members:



- **Add using Lookup.** Select if you would like to simply add contacts using the lookup tool to the Marketing List.
- **Add using Advanced Find.** Select if you would like to add contacts based on a certain search criteria which can be found by using the Advanced Find tool.

- **Remove using Advanced Find.** If you would like to remove contacts from the marketing list this can be done by using certain search criteria via the Advanced Find tool.
- **Evaluate using Advanced Find.** Select if you would like to evaluate which contacts to keep in the Marketing List based on a certain search criteria that can be used in Advanced Find.

i) Once the relevant Contacts have been found and added to the Marketing List select the **Save** icon in the bottom right hand corner of the screen. The Marketing List that has been created is now ready to be used with a Communication Audience.

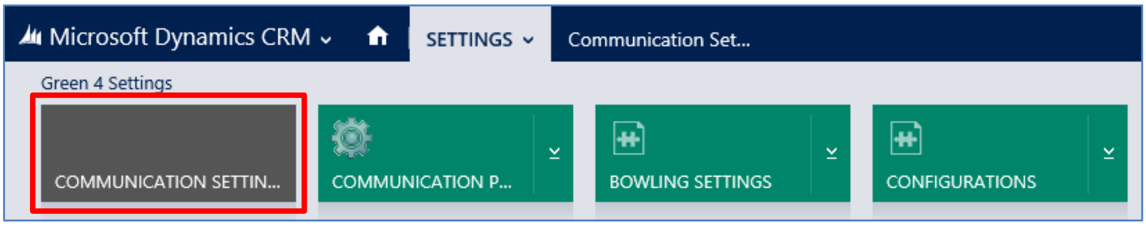
COMMUNICATION SETTINGS

It must be noted that the Communication Settings are set up during the implementation of the system and should only be changed by admin users. The Communication Settings is the area which will be used to implement and manage the settings for the communication. Within the Communication Settings it is possible to set a number of default fields so they will be automatically completed upon creating the communication as well as controlling any Test Communications.

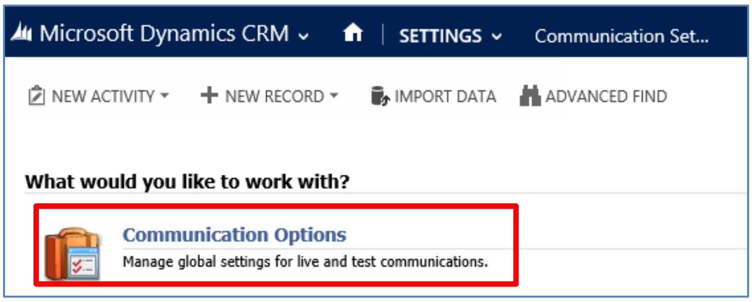
To change the Communication Settings complete the following:

a) Select or hover over the **Microsoft Dynamics CRM** tab in the navigation bar before scrolling across and selecting **Settings** from the drop down.

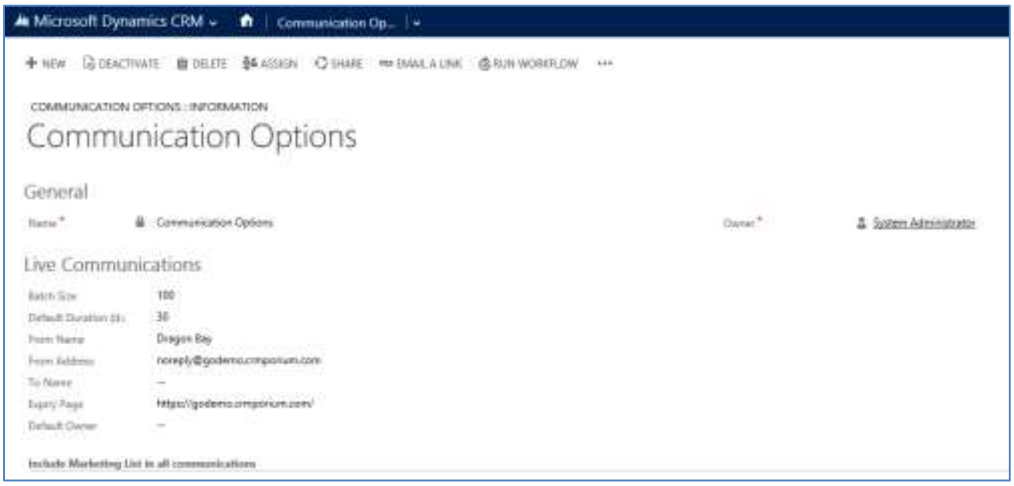
b) Next select the Settings tab in the navigation area and choose **Communication Settings** from the drop down.



c) An option asking 'What would you like to work with?' will be shown. Click on the link beneath it **Communication Options.**



d) The Communication Options window will be displayed.



General

- **Name.** The name, Communication Options will be locked and cannot be changed.
- **Owner**. This field will already be completed, if the correct Owner is not displayed use the Look Up to change this.

Live Communications

- **Batch Size.** This field only needs to be changed during the implementation of the module.
- **Default Duration (days).** Enter the days the communication is available to view online. After the default duration has been reached the user will be redirected to the expiry URL that has been entered into the Expiry Page field.
- **From Name.** Enter a default From Name, the name that is entered will be automatically be displayed when creating communications in the Comm Creator.
- **From Address.** Enter a default From Address, the From Address that is entered will be automatically displayed when creating communications in the Comm Creator.
- **To Name.** Enter a default To Name, the To Name that is entered will be automatically displayed when creating communications in the Comm Creator.
- **Expiry Page.** Enter a default Expiry Page URL, the Expiry Page URL that is entered will be automatically displayed when creating communications in the Comm Creator.
- **Default Owner.** Use the Lookup to select a default owner that will be used for all communications.

Include Marketing Lists in all Communications

- **Contacts.** If applicable, enter a Marketing List that a client can use as a seed list so that the Marketing Lists get added to all Communications that are sent. This allows Marketing Teams to check to see if Communications are being sent.

- **Leads.** If applicable, enter a Marketing List that a client can use as a seed list so that the Marketing Lists get added to all Communications that are sent. This allows Marketing Teams to check to see if Communications are being sent.
- **Accounts.** If applicable, enter a Marketing List that a client can use as a seed list so that the Marketing Lists get added to all Communications that are sent. This allows Marketing Teams to check to see if Communications are being sent.

Test Communications.

- **Test Batch Size.** Enter the default test batch size, this will be automatically displayed in the **Test Items** field when testing the communication within the design stage of the comm creator.
- **Test Recipients.** Enter the default test address, this will be automatically displayed in the **Test Address** field when testing the communication within the design stage of the comm creator. A semi colon can be used to separate multiple test addresses.
- **Test SMS Phone Number.** This field is not applicable for eComms 5.

Activation

- **Activation Code.** This field only needs to be changed during the implementation of the module.
- **Customer ID.** This field is locked and will be automatically completed.

Status

- **Last Audit Download.** This field is locked and will be automatically completed.
- **Last Item Update.** This field is locked and will be automatically completed.
- **Last Response Download.** This field is locked and will be automatically completed.

e) Select the **Save** icon in the bottom right hand corner of the form.

COMM CREATOR- CREATING THE COMMUNICATION

The Comms Creator allows an eCommunication to be created quickly and easily. It gives an end to end offering, allowing communication to be created, audiences to be targeted and results to be immediately provided and ready for analysis all in a single area of CRM.

The progress bar splits each part of the creation of a communication into the following manageable segments:

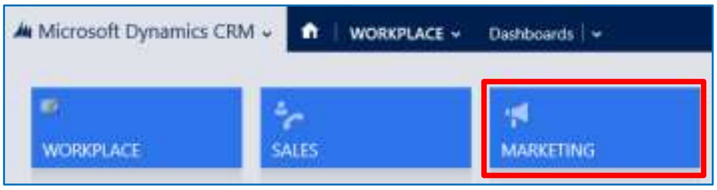
General ➡ Audience ➡ Set Up ➡ Layout ➡ Design ➡ Publish

Each one of these 6 stages will need to be completed to publish a communication.

NAVIGATION

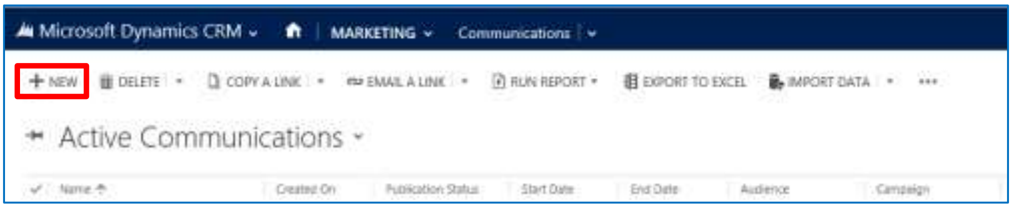
To create a New Communication navigate to the following area:

a) Select the **Microsoft Dynamics CRM** tab and from the drop down select **Marketing** in the navigation area.

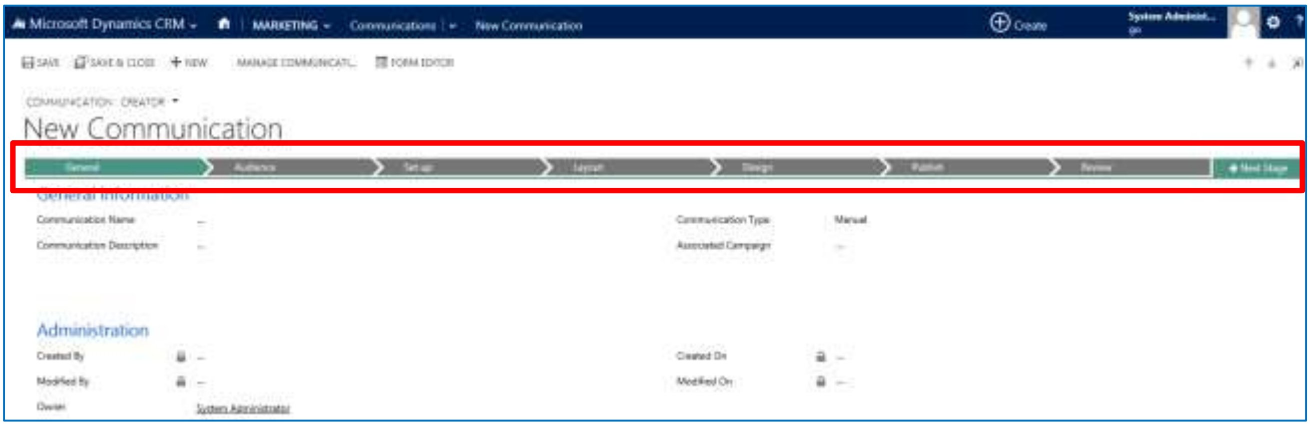


b) In the navigation area select the **Marketing** tab and from the drop down scroll across before choosing **Communications.**

c) Any currently Active Communications will be displayed, select **New** on the ribbon.

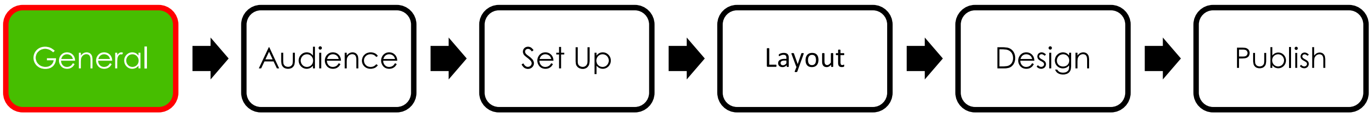


d) A New Communication form will be displayed. At the top of the form a progress bar will be visible:



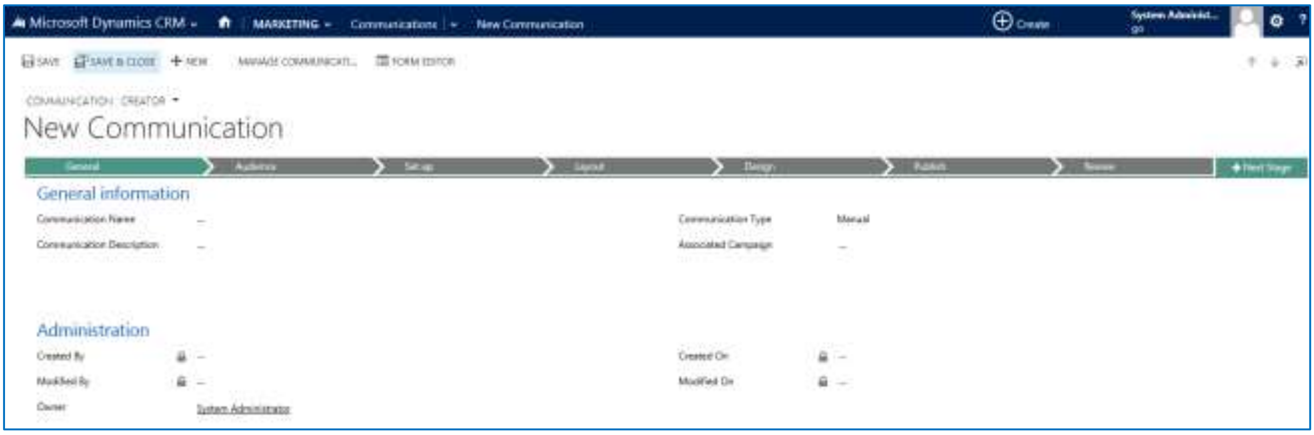
e) Each one of the stages within the progress bar will need to be completed to publish the communication. Each of these stages are described in the following 6 sections.

1. GENERAL



The General section is where the internal reference details regarding the communication are entered into:

a) Upon navigating to the General area when creating a New Communication, complete the following within the form:



General Information

- **Communication Name.** Enter the name of the communication.
- **Communication Description.** This is a mandatory field where a description of the communication must be entered into. The description can be used as a future reference for the communication.
- **Communication Type.** From the drop down select the type of communication that is being created. Choose from:
  - **Manual.** Select Manual if the communication is being used for marketing purposes and unsubscribed contacts will not receive the emails.

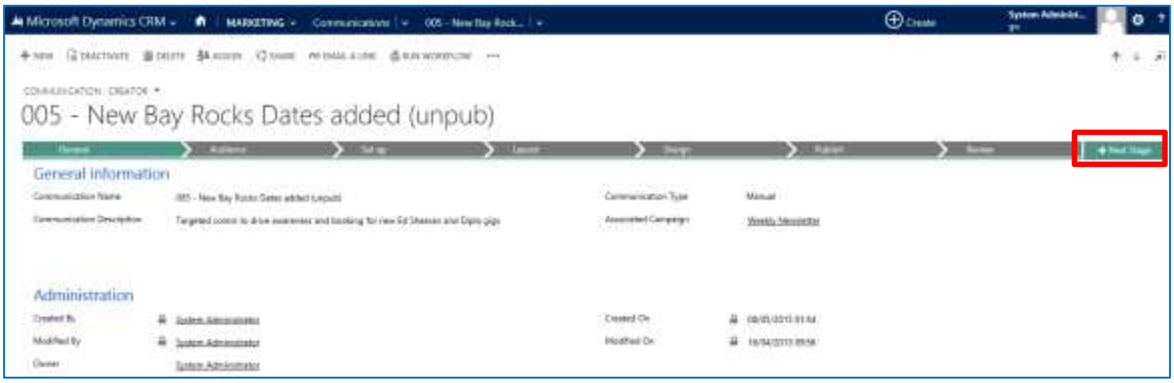
- **Automated.** Select Automated if the communication is a transactional communication, i.e. forgotten password or booking confirmation. Transactional communications we be delivered regardless of recipient subscriptions status.

- **Associated Campaign.** Use the look up to select an Associated Campaign. A range of communications can sit under one campaign such as a Summer Campaign or a Weekly Newsletter. If no Campaign currently exists within the system a new one can be created by selecting the look up and choosing New.

Administration.

- **Owner.** The current owner will be automatically displayed and locked into place.
- ***All fields in the Administration area will automatically complete and are locked so cannot be changed.***

b) When the General section has been completed, select the small save icon in the bottom right hand corner of the screen before choosing the **Next Stage** button in the progress bar to proceed to the Audience section.



EXAMPLE OF A COMPLETED COMM CREATOR- GENERAL SECTION

The table below shows the mandatory general section fields that have been completed in an example communication that has been created for this document.

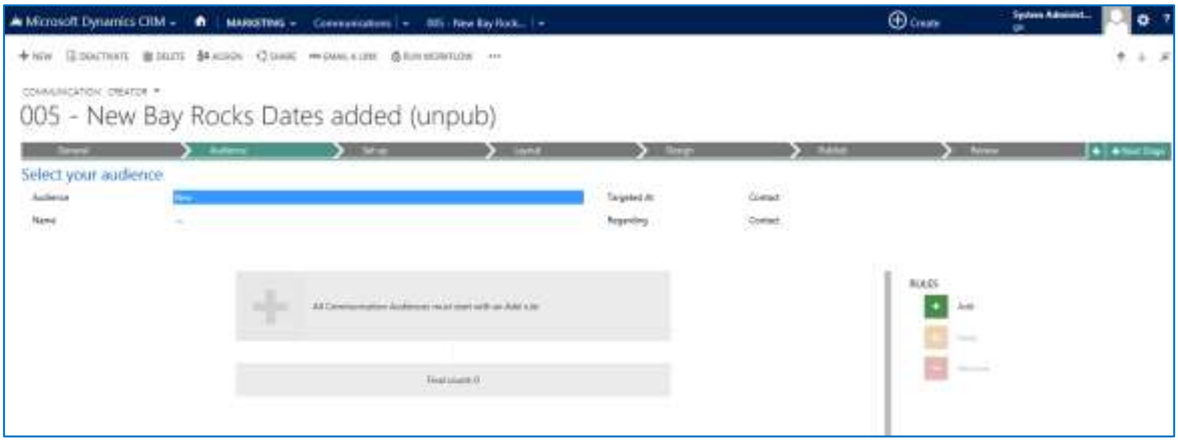
Communication Name	Communication Description	Communication Type	Associated Campaign
New Bay Rocks Dates added	Targeted comm to drive awareness and booking for new Ed Sheeran and Diplo concerts	Manual	Weekly Newsletter

2. AUDIENCE

General ➡ **Audience** ➡ Set Up ➡ Layout ➡ Design ➡ Publish

The Audience section is where the audience for the chosen communication is to be sent. It is important to know the audience that a communication is to target and this section allows the Audience to be specifically chosen. The Audience Builder uses segmentation rules which can be dragged and dropped to quickly create a target audience. It is also possible to add an already existing Communication Audience here as well as any previously created Marketing Lists or Flows to control the Audience of the communication.

m) To create the Audience of the communication complete the following:



- **Audience.** From the drop down select one of the Audience types described in the table:

Audience type	Description
New	Select New if creating a new Audience for the communication to target. A Communication Audience is often used when creating a Manual Communication Type, for example when targeting a specific group for marketing purposes. It is also possible to add an existing Marketing List to a new Audience when adding the rules. Upon selecting **New** continue to complete the fields that are listed below, beginning with **Name**.
Existing	Select Existing if there is a previously created Communication Audience on the system that is to be used for this communication. If Existing is selected, the fields that need completing, compared to if New is selected, will change. The Name field will no longer be shown and instead a **Communication Audience** field will appear where the Lookup should be used to find the existing Communication Audience. The **Targeted At** and **Recipient Lookup** fields will remain as are described below whereas the **Regarding** field will be locked and cannot be changed**.** The rules area will display the rules from the existing Communication Audience that has been chosen but the rules will be locked and cannot be changed within this area. Therefore the Next Stage button within the progress bar can then be selected to progress to the Set Up section.
Flow	Select Flow if a Communication Flow is to be used to control the audience of this communication. A Flow is usually chosen when creating an Automated Communication Type that are sent using a trigger such as a Booking Confirmation or Password Reminder communication. If flow is selected the only fields that will be displayed shall be **Targeted At**, **Regarding and Recipient Lookup** as are discussed below. A rules area will not appear if Flow is selected meaning upon completing the fields the Next Stage button within the progress bar can be selected to progress to the Set Up section.

- **Name.** If creating a New Audience, enter the Name of the Communication Audience.
- **Targeted At.** From the drop down select who the Communication is targeted at. Choose from:
    - **Contact.** These represent individual people.
    - **Account.** These represent an organisation and/or business that are to be interacted with.
    - **Lead.**
- **Regarding.** From the drop down list choose what entity the communication is about/regarding. For example if creating a Booking Confirmation communication, Booking should be chosen. If creating a Password Reminder Communication, Contact should be selected.
- **Recipient Lookup.** This field will only appear if the Regarding option is different to the Targeted At option. This field defines the relationship between these two options. For example if Booking is chosen in the Regarding field you must choose which field on the Booking form should be used as the recipient field, such as selecting Contact

n) Upon completing these fields when creating a New Audience, the rules which will govern who the communication will be sent to must be added. Rules are used to determine who the audience are.

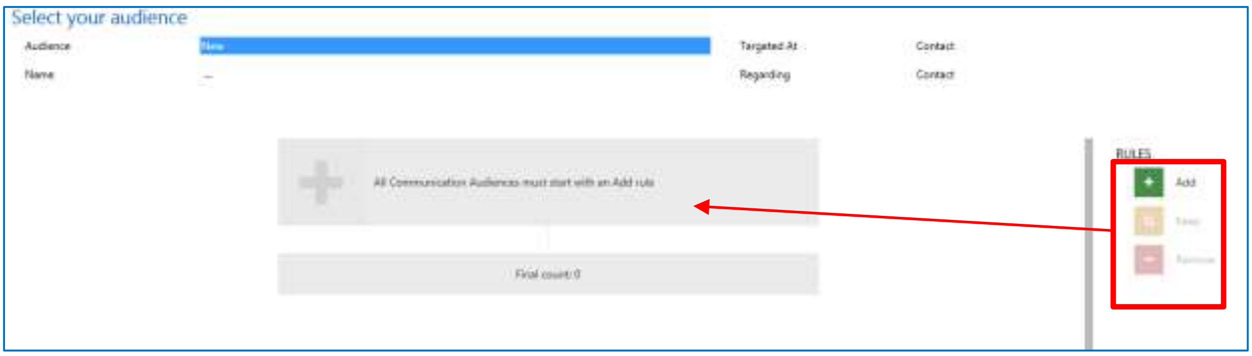
o) There are different types of rules that can be added to the Audience depending on which icon is selected, however it must be noted that all communications must begin with an Add rule being inserted:

Add - The green **Add** button can be used to add rules that will add audience members (These being contacts, accounts or leads) to the audience, for example Add all contacts with a valid email

Keep - The orange **Keep** button can be used to keep certain audience members within the audience, for example keep contacts aged between 21 and 30. Those not within this age will be removed from the audience.

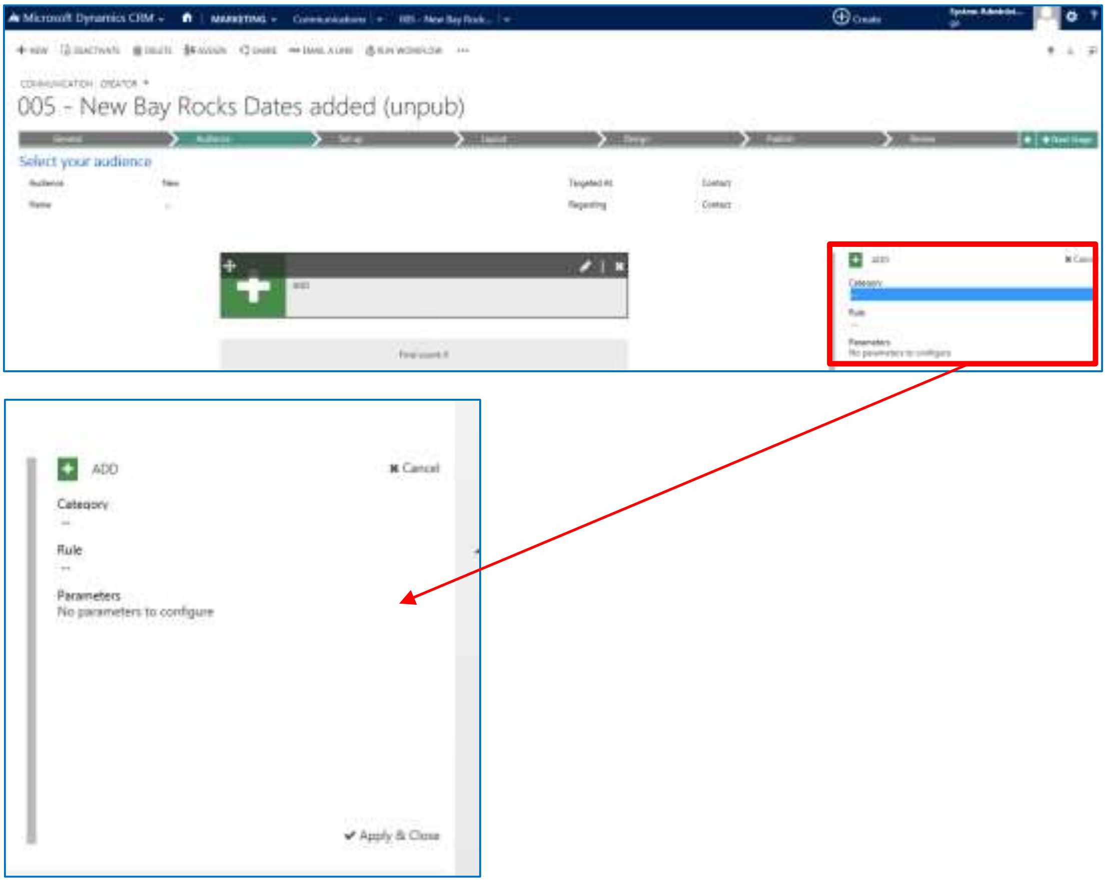
Remove - The red **Remove** button can be used to add rules that will remove audience members from the audience, for example remove contacts who have 'Male' as the gender.

p) To add a rule, drag and drop the relevant rules icon into the rules area.



q) After dragging and dropping the relevant rule icon into the rules area, it will then be possible to choose the **Category** and **Rule** of the Audience Rule in the editing pane.

There is a huge range of rules available that can be added but depending on the rule icon that has been dragged and dropped into the rules area (Add, Keep or Remove Icon) the Category and Rules that can be selected will differ.

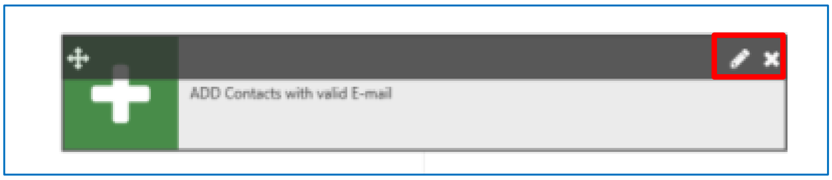


- **Category.** Choose a Category from the drop down list. The Category that is chosen will enable certain Rules to be chosen.
- **Rule.** Depending on which Category has been selected a list of rules will be displayed from the drop down.
- **Parameters.** This field will only need to be completed for certain rules that have been chosen. For example if a Category of Booking-Channel is chosen with a Rule of Contacts who booked through channel X the Parameters fields would have to be completed to select the correct Channel.

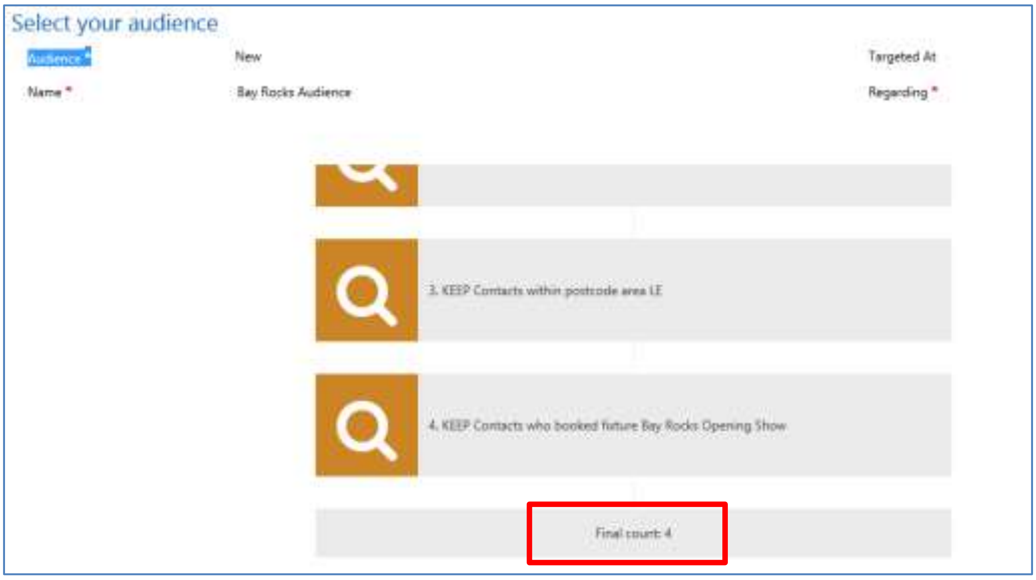
r) Select **Apply & Close** in the editing pane, repeat the above steps of adding a rule until all the relevant rules have been added to target an audience.

Note. The rules operate in a sequence. It is possible to change the sequence of the rules by dragging them up and down. The rule at the top of the sequence will be the first that is applied to target an audience with each rule that sits beneath it working in order to segment who the communication will be sent too.

s) It is possible to edit or remove a rule once it has been added. To edit a rule hover over it and choose the pencil icon, this allows the rule to be then edited. To delete a rule, hover over the rule and choose the cross.

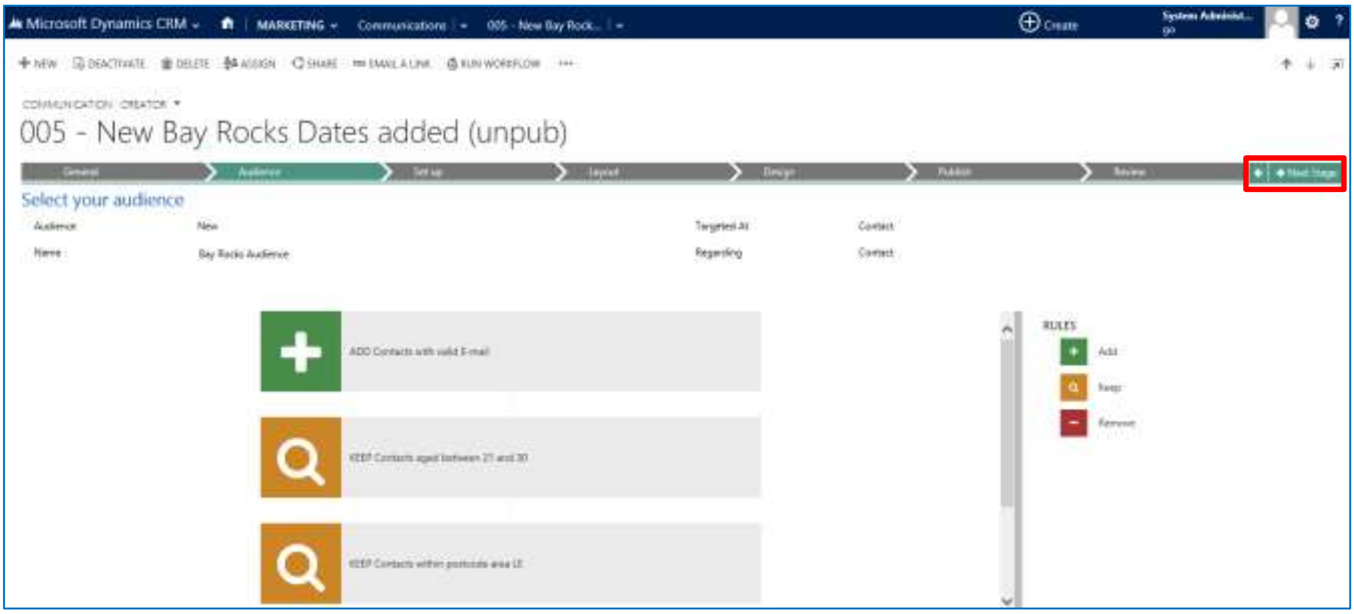


t) It is also possible to see the Final Count of the audience and as new rules are added this count will continuously update to demonstrate the quantity of the audience.



Note. Marketing Lists can be inserted as an Add rule as can be seen below. This can enable all members of a Marketing List to be added to build up an audience.

u) Upon adding all of the rules, select the save icon in the bottom right hand corner of the screen before choosing the **Next Stage** button in the progress bar to proceed to the Set Up section of the communication.



EXAMPLE OF A COMPLETED COMM CREATOR- AUDIENCE SECTION

The table below shows the fields and rules that were added to create a New Audience for an example communication that has been created for this document.

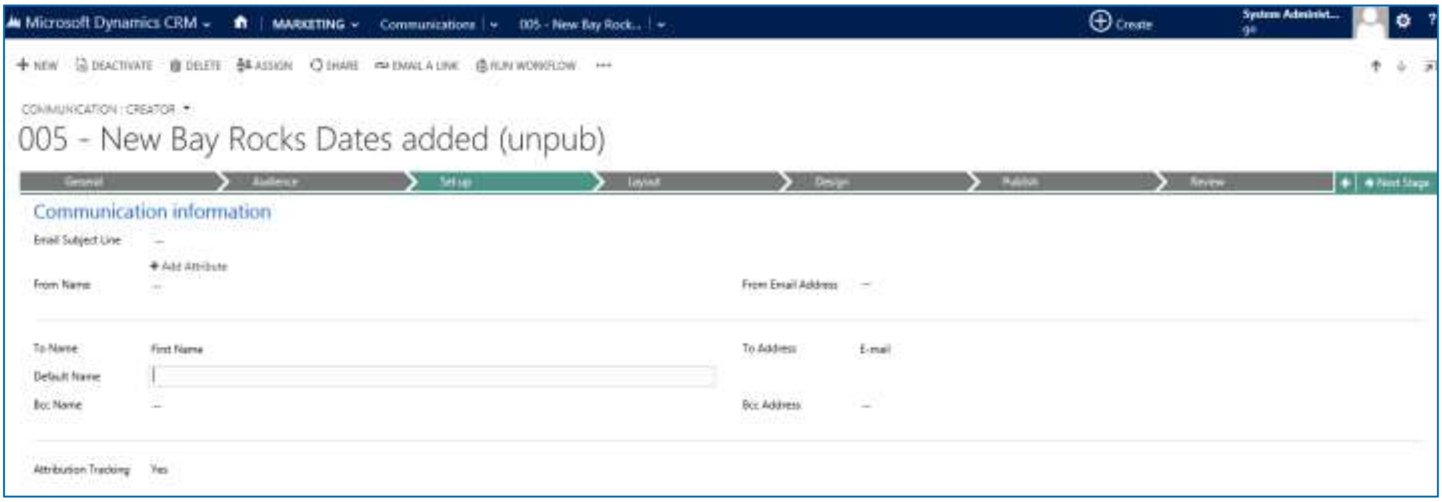
Audience	Name	Targeted At	Regarding	Add Rule	Keep Rule	Remove Rule
New	Bay Rocks Audience	Contact	Contact	Add contacts with a valid email	Keep Contacts aged between 21 and 30	Remove contacts who are Male

3. SET UP

General ➡ Audience ➡ **Set Up** ➡ Layout ➡ Design ➡ Publish

The Set Up section is where more information regarding the communication is entered.

a) The following must be completed within this area:



- **Email Subject Line.** Enter a subject line for the communication.

  Related to the subject line is the Add Attribute tab. By selecting the Add Attribute it will be possible to attribute a value for the selected recipient type.

- **From Name.** Enter the name of the person the email should appear to have come from, this is important for deliverability and spam. If a From Name has been entered in the default Communication Settings area, then this field will be automatically completed. Even if a default From Name has been entered it is still possible to change it here.

- **From Email Address.** Enter the email address that the email should appear to have come from, this is important for deliverability and spam. If a From Email Address has been entered in the default Communication Settings area, then this field will be automatically completed. Even if a default From Email Address has been entered it is still possible to change it here.

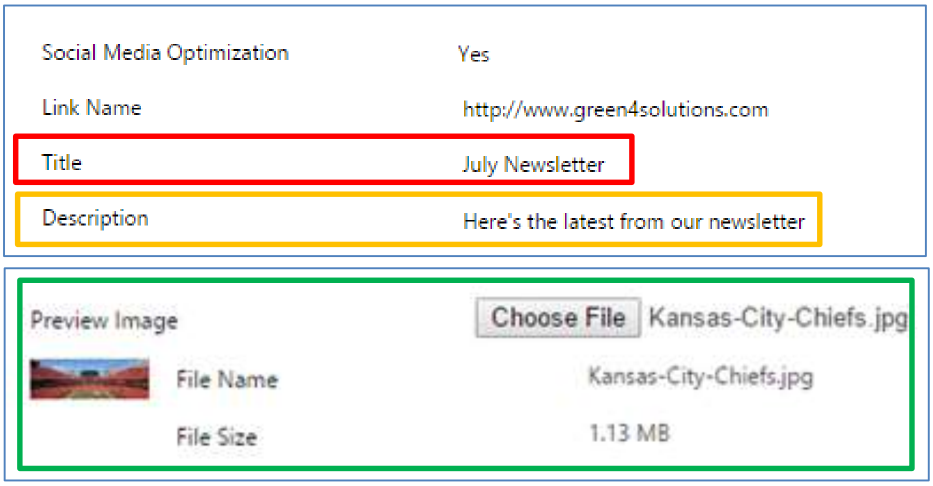
- **To Name.** From the drop down select the field that will be taken to display who the communication is to be addressed to. For example, choose First Name if the communication is to be addressed to the First Name of the audience who are receiving it.

- **Default Name.** Enter a relevant default name that will be used if the To Name that has been chosen cannot be found within the system, for example the default name of 'Guest' or 'Fan' could be chosen here.

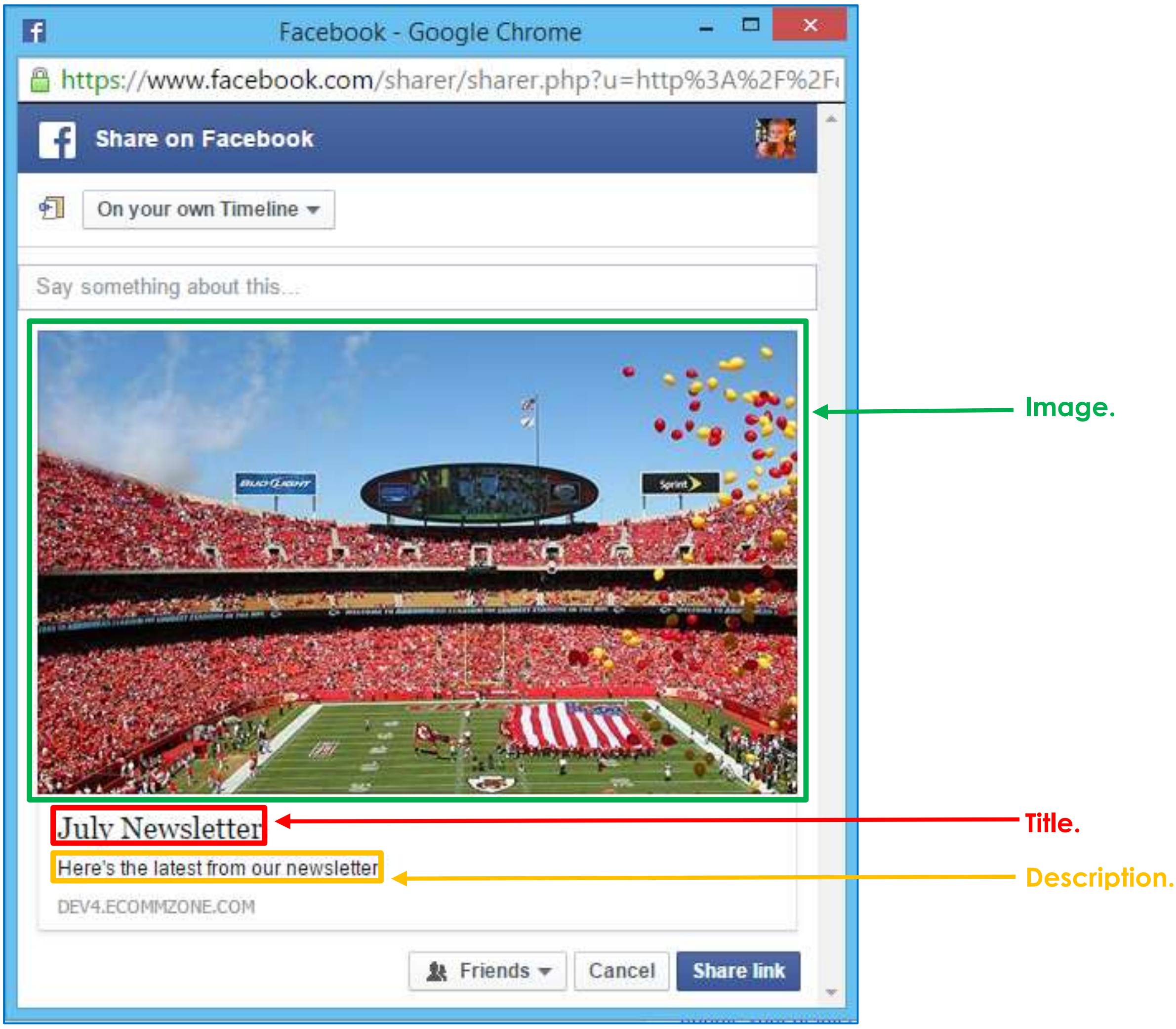
- **To Address.** From the drop down select the form of address that is going to be used to send the communication, as expected E-Mail is usually chosen here.
- **Default Address.** Enter a relevant default address that will be used if the To Address that has been chosen cannot be found within the system.
- **Bcc Name.** If applicable, enter the name of the email account that will receive the blind carbon copies (BCC) of the communication. This field is used in unison with the Bcc Address field. This field is only advised for certain clients and should not be used unless you have been advised to.
- **Bcc Address.** If applicable, enter the email address of the account that will receive the blind carbon copies of the communication email. It must be remembered that the selected email address will receive a copy of each of the emails sent as part of the communication. E.g. if there are 100 audience members the BCC email address will receive 100 emails. This field is only advised for certain clients and should not be used unless you have been advised to.
- **Attribution Tracking.** Select **Yes** or **No** depending if Attribution Tracking is to be turned on or off for this email. Attribution tracking applies logic to determine the ROI of the communication and then assigns related metrics, like volume, value and product information, to the communication on the review stage. The in-built attribution tracking logic assigns key booking metrics to the last communication the purchaser opened and clicked from within the last 7 days. In the Review section of the communication it will be possible to see the booking revenue that has been made from the email.
- **Social Media Optimization.** Select **Yes** or **No** depending on if Social Media Optimization is to be used for this communication. This will allow the content of the email to be shared via Social Media. If **Yes** is selected the following fields will appear and must be completed:
    - **Link Name.** Enter a link Name, This is only used when sharing via Facebook to set the tag and represents a name for the ecomm page.
    - **Title.** Enter a title for the content that is to be shared. The title will only be displayed when the Communication is shared via Facebook
    - **Description.** Enter a description of the content that is to be shared. This is used for Facebook and Twitter tags and displays a description beneath the Title of the shared content on Facebook.
    - **Preview Image.** Use the **Browse** button to select an image that will be shown if the communication is shared on Facebook.
    - **File Name.** The File Name of the image that is to be used will automatically display.
    - **File Size.** The File Size of the image that is to be used will automatically display.

The example below shows how the information entered in the above **Social Media Optimization** fields can control what is displayed when a Communication is shared on Facebook.

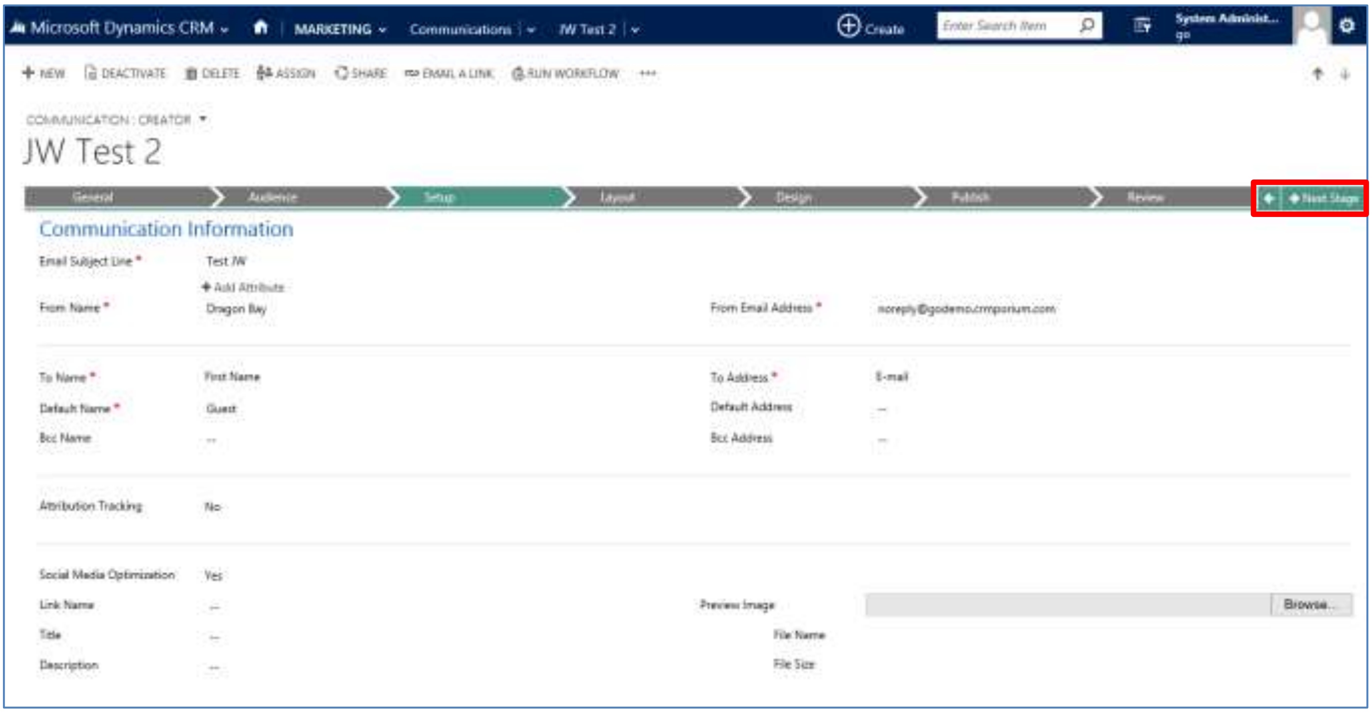
Social Media Optimization fields completed:



How the information is delivered on Facebook when the Communication is shared:



b) Upon completing the above stage select the **Next Stage** button in the progress bar to proceed to the Layout section of the communication.



EXAMPLE OF A COMPLETED COMM CREATOR-SET UP SECTION

The table below shows the mandatory Set Up section fields that have been completed in an example communication that has been created for this document.

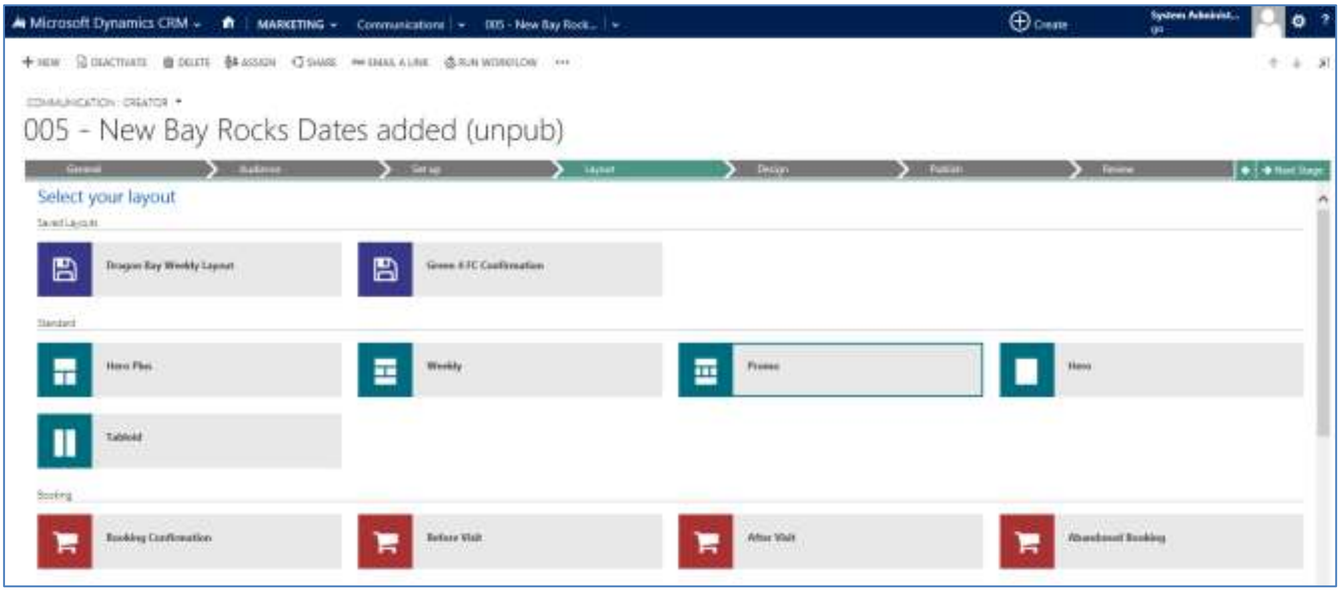
Email Subject Line	From Name	From Email Address	To Name	Default Name	To Address
New Dated added for Bay Rocks	Dragon Bay	noreply@godemo.crmporium.com	First Name	Guest	E-mail

4. LAYOUT

General ➡ Audience ➡ Set Up ➡ **Layout** ➡ Design ➡ Publish

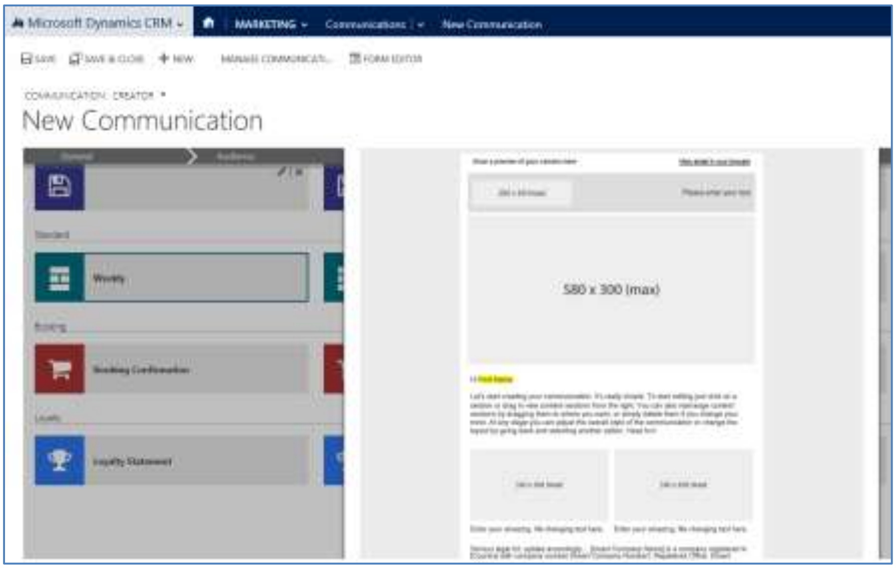
The layout that is selected determines the appearance of the communication. ECommunications 5 has a number of pre-designed layouts that have been tailored for the sports and leisure industry. Depending on which Go modules are available on your system, different layouts will be made available. All of these layouts are fully optimised for mobile.

a) To select a layout, simply click on the appropriate layout, it will then become highlighted.



If you would like to see what the layout may look like before selecting it then it is possible to preview it.

To preview the layout select the small picture next to the layout name, the curser will turn into a magnifying glass and a preview of the layout can be seen.



b) Upon choosing the Layout, select the **Next Stage** button in the progress bar to advance to the Design section.

Note. It is recommended that upon designing a communication, if it is a design that is going to be used regularly, then the layout should be saved. This will allow you to select the layout under the heading **Saved Layouts** so that you do not have to continuously keep having to design the email, meaning that only the content of it will need to be changed. The Layout can be saved within the Design section.

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5. DESIGN

General ➜ Audience ➜ Set Up ➜ Layout ➜ Design ➜ Publish

The Design section is where the email really starts to take shape and is where text, images, buttons as well as other forms of content can be added to the layout. The flexible editor allows a choice of content sections to be chosen to quickly design the communication to your specification within our best practice guidelines for maximum impact across multiple devices. Go allows you to place complex transactional data, such as purchase confirmation or loyalty statements into a communication with a few simple clicks. There is no need for third party tools to create a communication as they are all built within eCommunications 5. The easy to use drag and drop functionality is also used when designing a new communication.

To design a communication we recommend you follow the process below. This will allow the communication to come to life right in front of your eyes.

STRUCTURE AND CONTENT

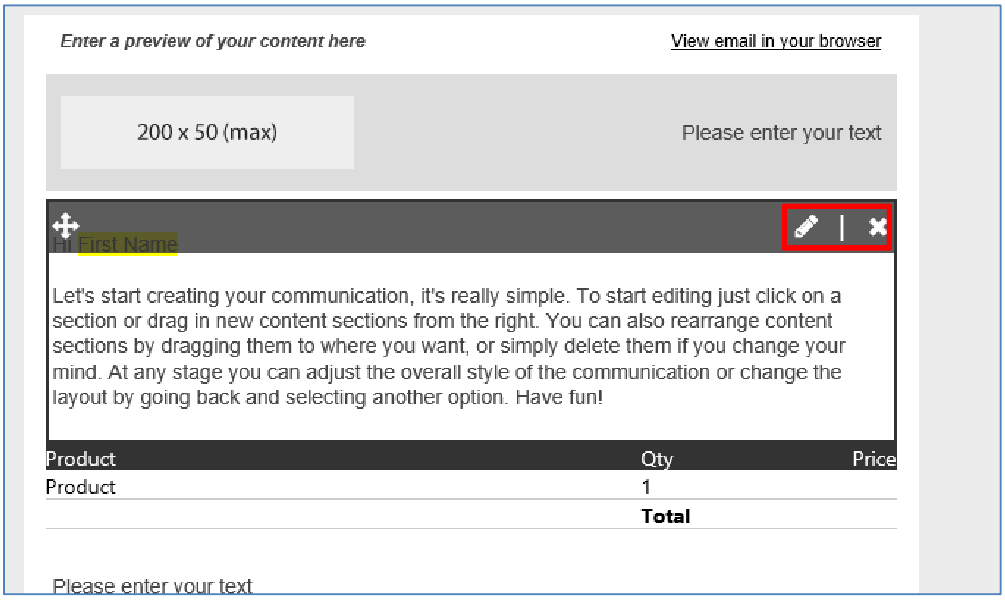
Firstly the structure and Content of the communication should be designed, this includes choosing what should be included within the communication such as where Images, Texts, buttons, Dividers, Social Sharing and other content of the email should be displayed.

a) With the New Communication open in design view, select the **Content** tab from within the configuration pane on the right hand side.

b) Simply drag and drop the relevant content into the email layout.

Each time a piece of content is dropped into the email the configuration pane on the right hand side will change into the editing pane to enable you to edit what has been placed into the email. For more information see the Editing section of this document.

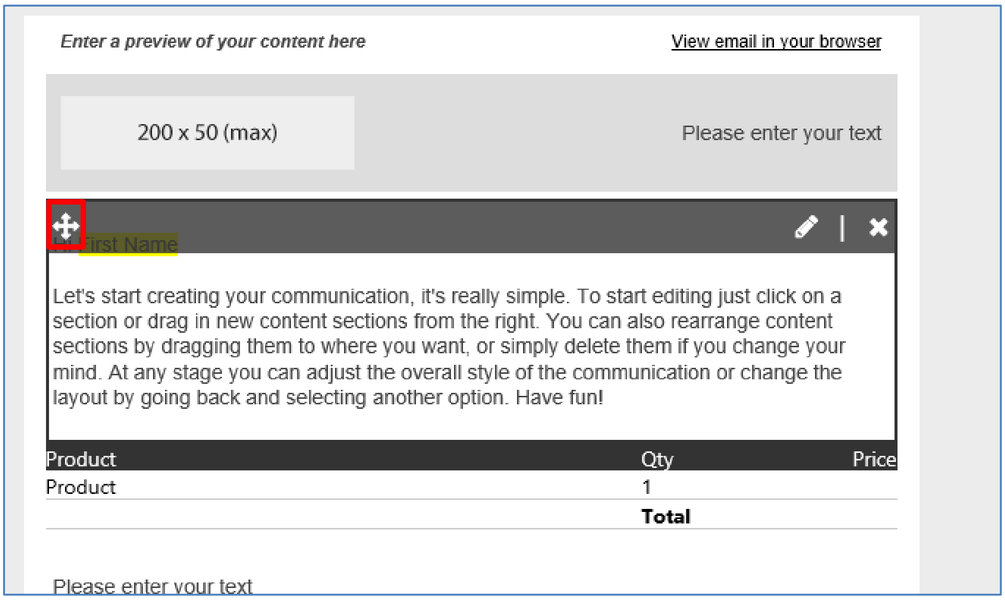
c) It is also possible to delete any existing content that is part of the layout or has been added, this is done by hovering over the relevant content and selecting the cross.



d) Content can also be edited, again this is done by hovering over the relevant content in the email area and selecting the pencil.

The editing pane will change so that it is possible to edit the content that has been selected. Upon completing the editing, choose **Apply & Close**. Contrastingly if you are unhappy with the editing and do not want to apply it, choose **Cancel** within the editing pane.

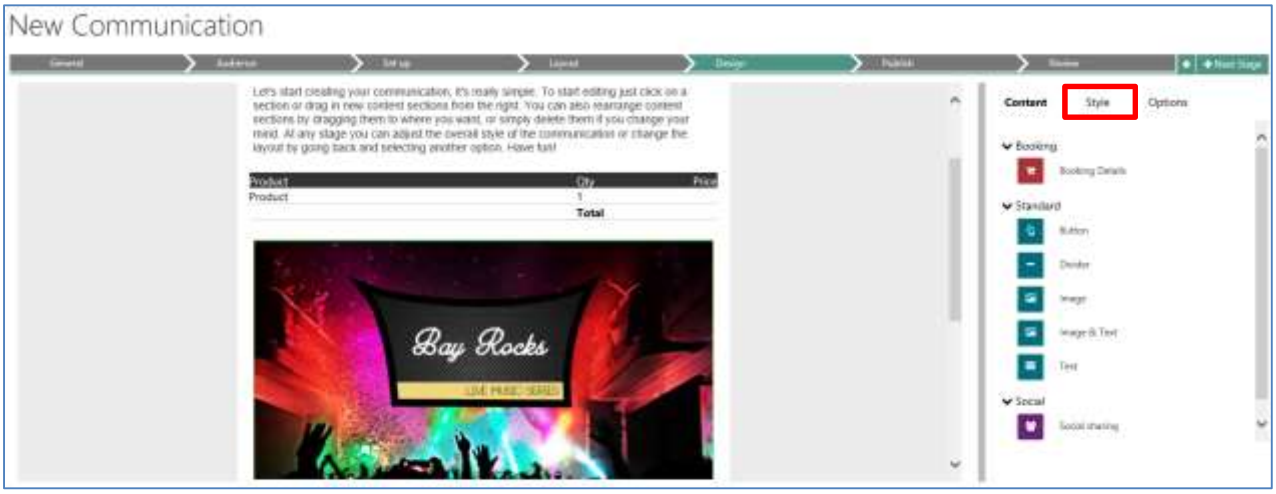
e) Additionally it is also possible to move content about within the email, this can be done by hovering over the relevant content and selecting the four arrows. It will then be possible to move the content elsewhere within the email.



STYLE

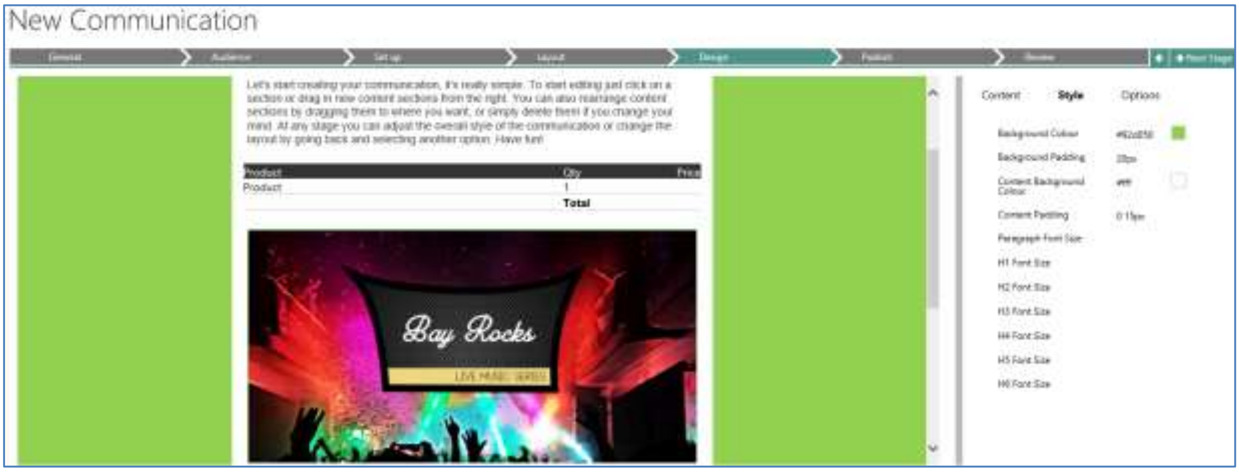
After adding the structure and content of the email, the next process is to give the communication some style. Styling includes adding the overall background colour, the background padding, content background colour and content padding as well as font styles.

a) To set the background colours and padding, with no content selected, select the **Style** tab from within the configuration pane on the right hand side.



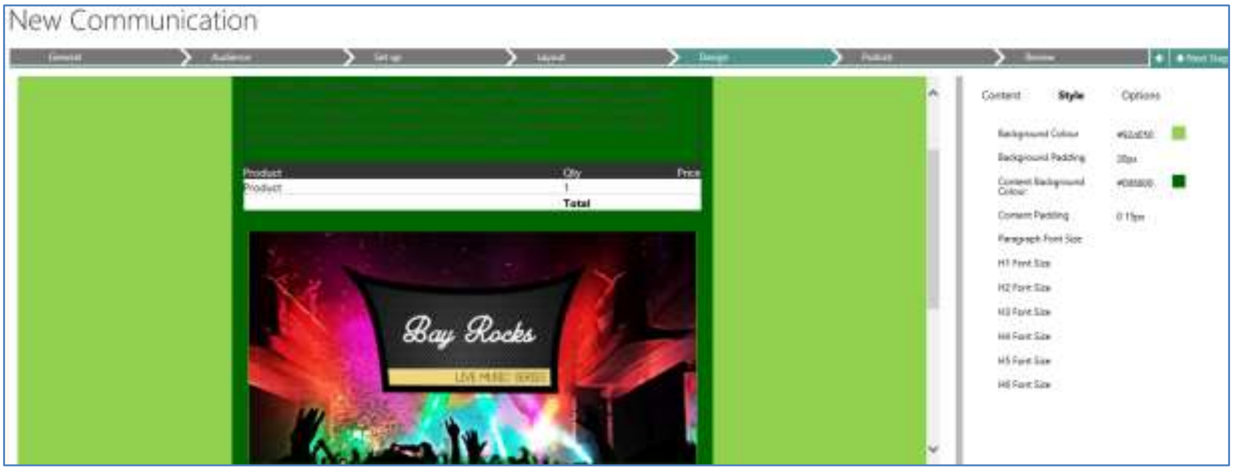
b) Select the following within the configuration pane to begin to style the communication.

- **Background Colour.** Choose the colour of the background of the email.

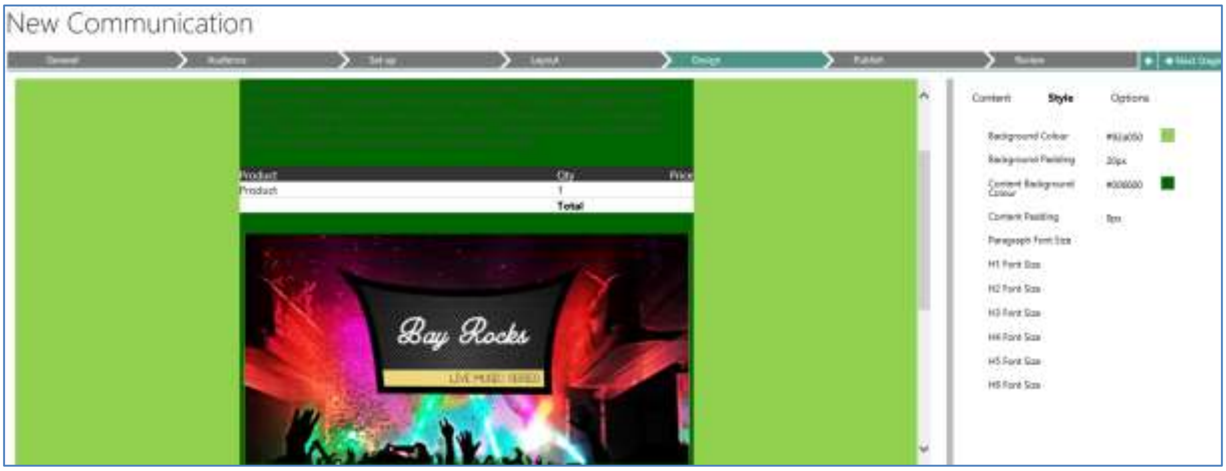


- **Background Padding.** Enter a value for the background padding. This will control if the email has the effect of 'floating' on the background or contrastingly that there is no top or bottom border of the email. If no top or bottom border of the email is to be displayed enter **0px**. All **px** values above **0px** that are entered will increase the background border at the top and bottom of the email. Four values can be entered to control the top, right, bottom and left of the padding, for example: 2px 1px 3px 4px *(top, right, bottom, left)*.

- **Content Background Colour.** Choose the Background content colour of the email.



- **Content Padding.** The content padding controls the width and height of the padding within the content area of the email. Within the Content Padding field, four values can be entered to control the top, right, bottom and left of the padding, for example: 2px 1px 3px 4px *(top, right, bottom, left)*. If no Content Padding is needed *within the* email at all, enter 0px with no other values necessary.



c) To change the style of the content within the email such as the Text, Images, Social sharing and Buttons, hover over the relevant content within the live preview and select the pencil icon.

The configuration pane will change to the editing pane so that it is possible to edit the Content. Select **Style** within the pane. Depending on which content is being edited the Style options will be different. The below example shows the Style option of Text.

For example if Text has been chosen to edit, areas such as the Text Colour, Font, Font Size, Weight, Height and Alignment can all be changed.

Additionally by selecting the Content tab within the Style section it is also possible to change the Background Colour, Border Type, Thickness and Colour as well as the Padding and Margin of the text content.

Contrastingly if an image has been chosen to edit, by selecting the Style tab in the editing pane it will only be possible to edit the Background Colour and Padding of the image. Each kind of content will offer different Style options that can be changed as is shown below.

Upon editing each piece of content, select **Apply & Close** in the editing pane.

d) The Settings of the individual content areas of the email can also be changed when they are selected and the editing mode has been entered into. Within the editing pane select the **Settings** tab, depending on the type of content that has been selected to be edited the Settings that are displayed will differ.

For example the Settings for Text gives the option of changing the number of Columns, the Column Split, if columns should be stacked and the option for the text to be shown On Mobile.

In contrast the Settings area of an Image gives an Alignment option and the option to Show on Mobile.

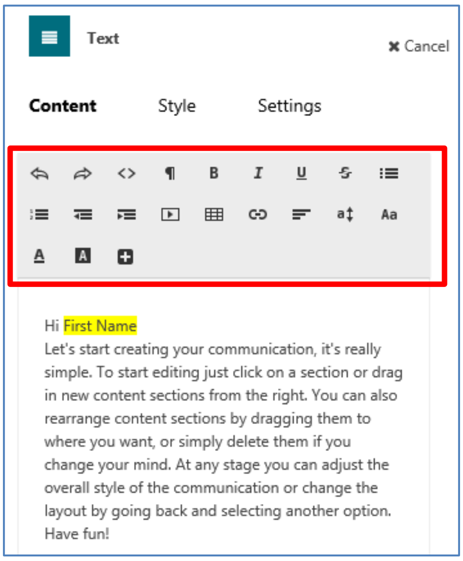
e) After completing the Structure and Styling we recommended that the user saves the layout if they would like to use the template for future communication.

Note. If at any stage when designing the communication you decide to change the Layout of the communication it is possible to select the Layout tab in the progress bar and change Layouts before returning back to the Design section. This will not delete the current content of the communication but just change the Layout. It is recommended that if the layout is changed that it is previewed first before confirming that this is the layout you would like.

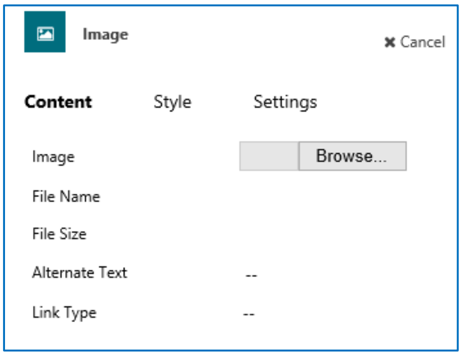
EDITING

Each time a piece of content is dropped into the email or the pencil icon is selected after the content has been hovered over the configuration pane on the right hand side will change to the editing pane to enable you to edit what has been placed into the email.

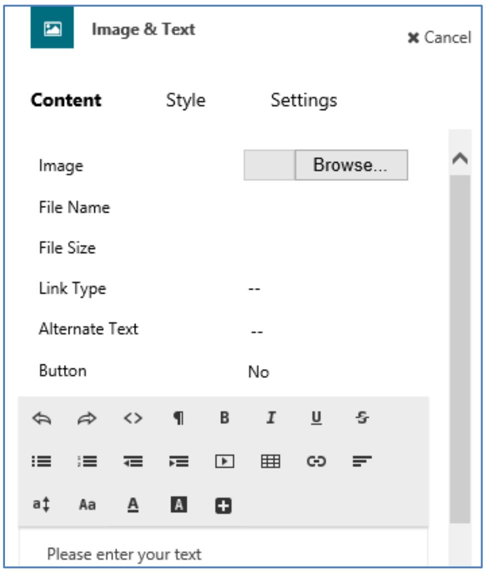
For example if the Text content is added, the editing pane will allow you to enter the text that is to be shown as well as allowing HTML, videos, tables, links and attributes to be added within the text. This can be seen in the highlighted area below:



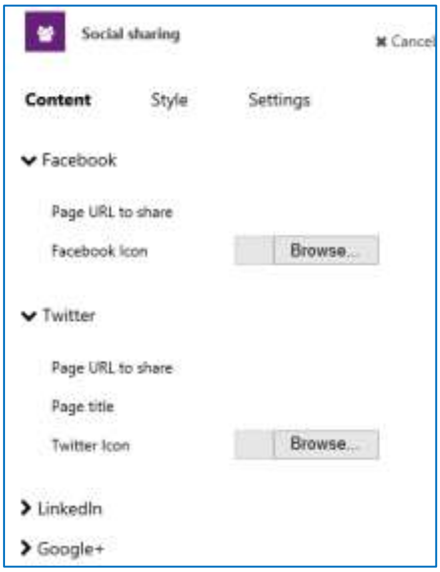
Contrastingly if the image Content is added to the email the editing pane will change so that it is possible to browse for an image to add to the email:



If an Image & Text Content section is added it is possible to both browse for an image to add to the email as well as a text section. Additionally the Image & Text section has the option to insert a Button. The Button option will be defaulted to No but if Yes is selected an additional Button Text field will be shown, this being where the name of the button can be entered into. Additionally, a Link Type field will appear, this being where it is possible to select what the Button is linking to. More information on Link Types can be found in the next section. Like other components of the content section the Button can be styled by selecting the Style tab in the editing pane.



When adding Social Sharing content the editing pane will change to display a list of Social networks, for each one that is going to appear in the email, the URL to the relevant page can be added:

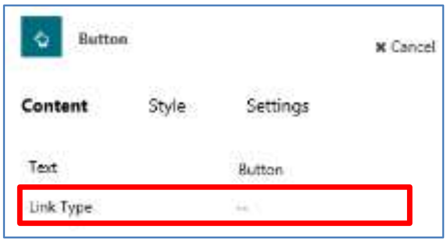


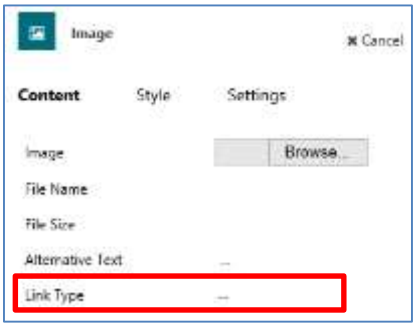
Note. When browsing for an image to upload into the communication that it is only possible to upload images that are saved on your computer.

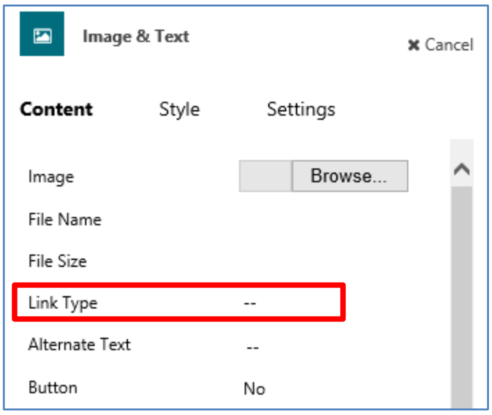
Link Types

It is also possible to add Link Types to the content types of **Button**, **Image**, **Image and Text**. These can be added to the content of a Communication.

When the above content types are selected, each editing pane will change so the selected content can be edited. The Link Type option can be selected, this will display a drop down offering a selection of the different Link Types that can be added to the content.







The following Link types can be added to the content types and depending on the Link Types selected additional fields will need to be completed. Information on each Link Type is listed below:

- **Web Address.**

When the Link Type of **Web Address** is chosen a new field will be displayed called **Link**. This field should be entered with the following:

  - **Link.** Enter a URL into this field. The URL will open in a new window when the content section that the Link Type of Web Address has been added against is selected within the published Communication.

    For example a Web Address of an organisations website could be entered into the Link field of a certain content section allowing recipients of the Communication to click on a section of the Communication to reach the web page.

Select **Apply & Close** in the editing pane after adding the Link Type and completing the appropriate fields.

- **Email Address.**

Text	Button
Link Type	Email Address
Email Address	--
Email Subject	--
Email Content	--

The Email Address Link Type can be selected if it is necessary for a pre-populated email to open when selecting a certain content section within the Communication. When the Link Type of Email Address is chosen three new fields will be displayed, these being **Email Address**, **Email Subject** and **Email Content**. These fields should be entered with the following:

  - **Email Address.** Enter the Email Address which will be automatically be pre-populated in the To area of the email.
  - **Email Subject.** Enter the Subject of the Email which will automatically appear in the Subject area of the email.
  - **Email Content.** Enter any content that will be displayed in the content section of the email.

For example an Email Address Link type may be used in a content section that is called 'Contact Us,' by clicking on it the user's default email application will open with a New Email with the Email Address, Email Subject and any Content pre-populated.

Select **Apply & Close** in the editing pane after adding the Link Type and completing the appropriate fields.

- **Predefined.**

Link Type	Predefined
Link	--

The predefined Link Type can be used in the content of the Communication. When the Link Type of Predefined is chosen a Link field will be displayed. A drop down within this field allows users to select one of the following Links:

  - **View Email in Browser.** Use this Predefined Link Type if when the content section is selected the Communication will open in a browser.
  - **Temporary Access.** Use this Predefined Link Type if when the content section is selected the user is to be linked to the Communications Portal where they will be able to Request Temporary Access in order to receive a further Communication to reset their password.
  - **Update Details.** Use this Predefined Link Type if when the content section is selected the user is to be linked to the Communication Portal where they will be able to update their details. However for security purposes if the user is not already logged into the Portal the Login page will appear first, prompting for a Username and Password before any details can be updated.

- o **Unsubscribe.** Use this Predefined Link Type if when the content section is selected the user is to be linked to the Communication Portal where they will be able to manage their subscriptions.

Select **Apply & Close** in the editing pane after adding the Link Type and completing the appropriate fields.

- **Attribute.** This Link Type can be ignored as it is not currently relevant to the module.

Link Type	Attribute
Attribute	--

- **Campaign Response.**

Link Type	Campaign Response
Campaign Name	--
Submit Text	Submit
Success Text	Thank you for your response
Text Section	
Title	--
Text Box	Small
Question Section	
Question	--
Placeholder	Please select...
Answers	

The Campaign Response Link Type can be used if it is necessary for response or feedback to be given as part of the Communication. When the content is selected within the Communication that has a Campaign Response Link Type associated to it a new window will be displayed where both text and questions can be both entered and answered. The following fields will appear when the Link Type of Campaign Response is chosen and the information that is entered into these fields will control what is displayed in the Campaign Response window.

- o **Campaign Name.** Enter the name of the Campaign.
- o **Submit Text.** Enter the text that will appear in the Campaign Response window to encourage users to submit their response. This is often just 'Submit.'
- o **Success Text.** Enter the text that will confirm to the user that their response has been submitted. For example this could be 'Thank you for your response.'

Text Section

- **Title.** Enter the title of the Campaign Response, this will be displayed at the top of the Campaign Response Window.
- **Text Box.** Select the Size of the Text Box that will appear in the Campaign Response widow. The following sizes can be selected; **Small, Medium** or **Large**.

Question Section

- **Question.** Enter the question that is to be shown in the Campaign Response window
- **Placeholder.** Enter the text that will appear in the drop down to highlight that this is where an answer is chosen. This is often 'Please Select.'

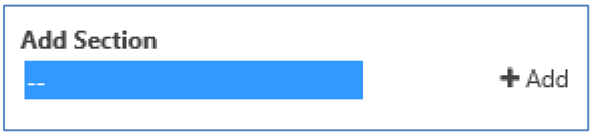
Answers

- Multiple answers can be added against a question. This is done by selecting the **+Add Answer** button. The sequence of the answers can be changed by selecting the arrows, whilst they can also be deleted by choosing the cross button.

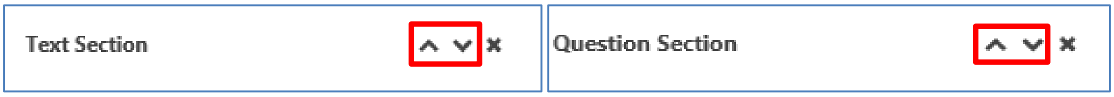
Select **Apply & Close** in the editing pane after adding the Link Type and completing the appropriate fields.

Note. It may not always be necessary to have a Text Section or Question Section in a Campaign Response window. If a Section is not required select the small cross as is highlighted below. The section will be removed

It is possible to re-add the Section, by scrolling to the bottom of the editing pane and choosing the drop down from the **Add Section**.



Additionally it is possible to move a section below or above the Text/Question Section by selecting the appropriate arrows as is highlighted below.

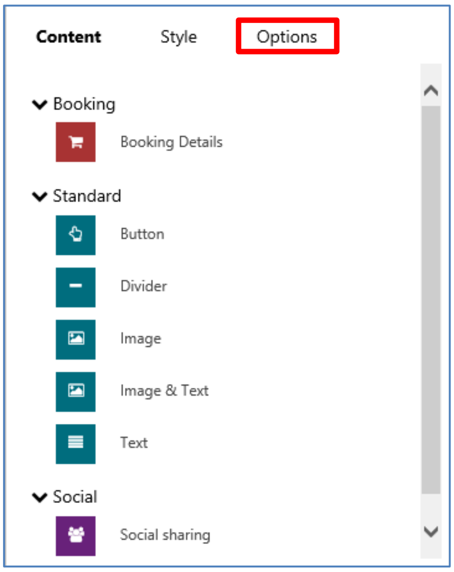


PREVIEWING THE COMMUNICATION

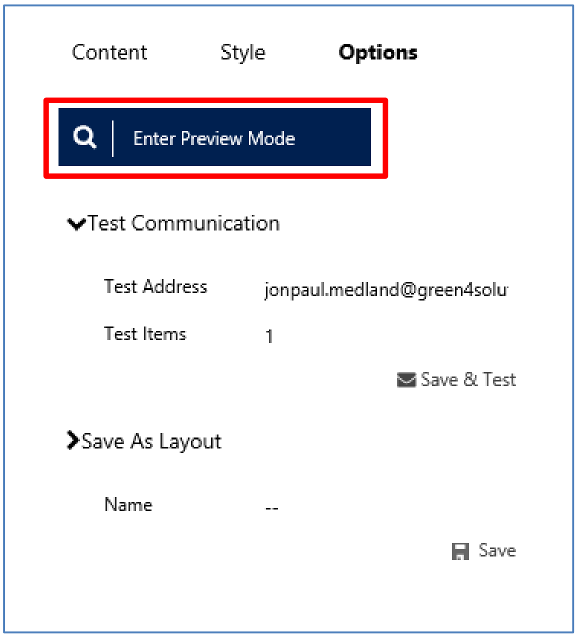
Upon completing the design of the communication it is possible to preview its responsive layout in a range of different devices. With the preview mode it is possible to see what the communication will look like in tablet, mobile and desktop view. Whilst this isn't a complete inbox preview it can be used to give quick piece of mind on the final design of the email.

To preview the communication, complete the following:

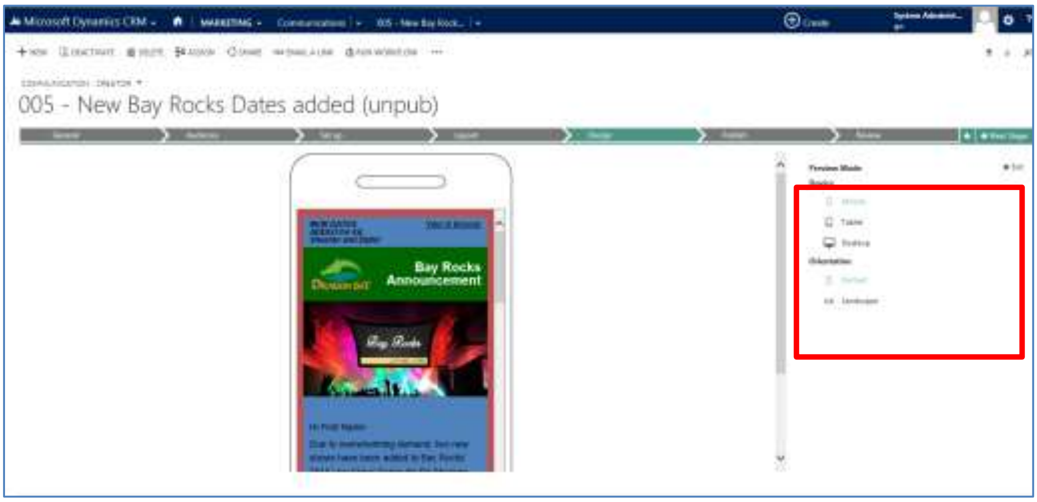
a) With no content of the email selected choose the **Options** tab in the configuration pane.



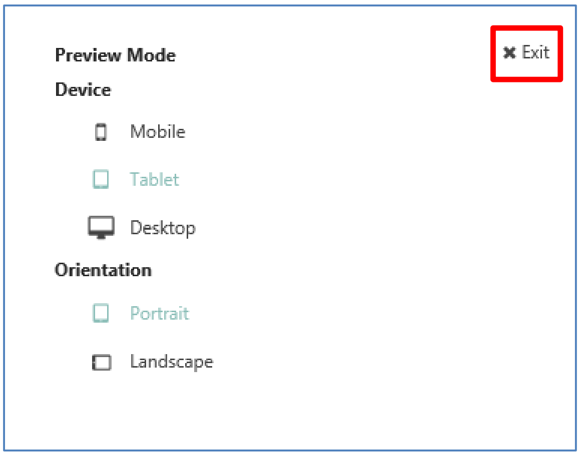
b) Within the Options area, choose the **Enter Preview Mode** button.



c) The Preview area will be displayed. Click on the different devices, **Mobile**, **Tablet** or **Desktop** in the Preview Mode area to view how the communication will be displayed in each of these. It is also possible to change the orientation of the communication to see it in landscape and portrait.



d) After previewing the communication, select **Exit** in the Preview Mode area. This will return you to the Design area.

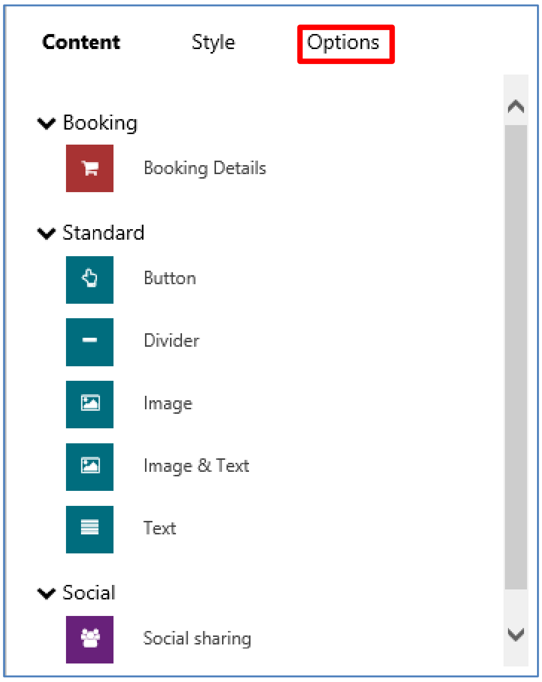


TESTING THE COMMUNICATION

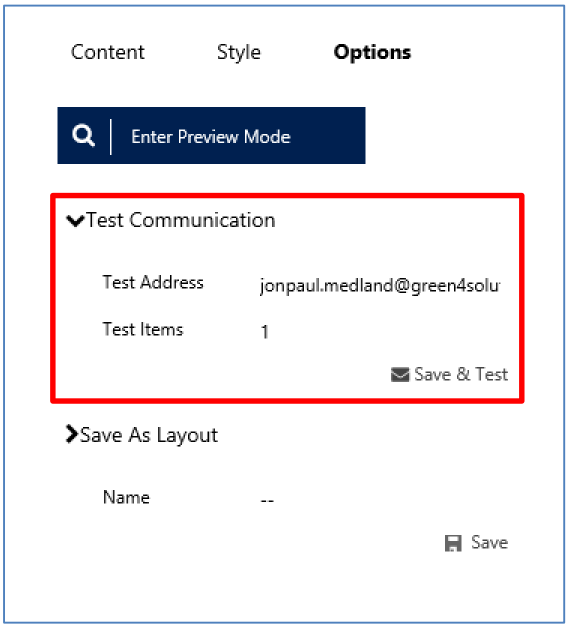
Despite being able to preview the communication on a range of different devices, it is still possible to send a Test Communication.

To send a test communication, complete the following:

a) Choose the **Options** tab in the configuration pane.



a) Within the Options area under Test Communication complete the following two fields:

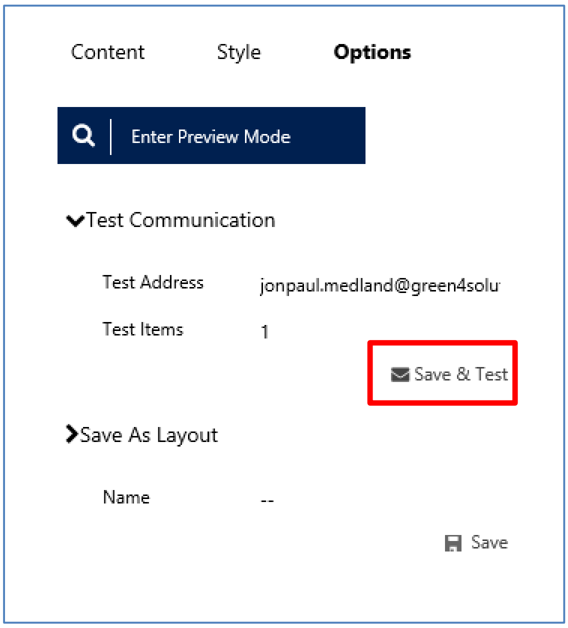


- **Test Address.** Enter the email address which the test email will be sent too. This field will be pre-populated with the addresses entered in the Test Recipients field of the Communication Settings form, however this can be overwritten if applicable.
- **Test Items.** Enter the number of test emails that are to be sent, the test email will also give a sample of the audience that it is being sent to so you can be sure that your entire

audience will receive the email correctly . This field will be pre-populated with the number entered in the Test Batch Size field of the Communication Settings form, however this can be overwritten if applicable.

b) Upon completing the above fields, choose the **Save & Test** button.

c) The Communication will then send.

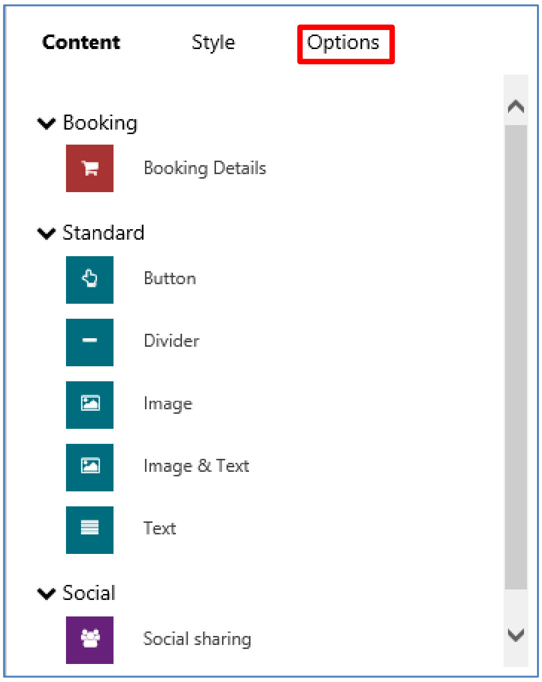


SAVING THE LAYOUT

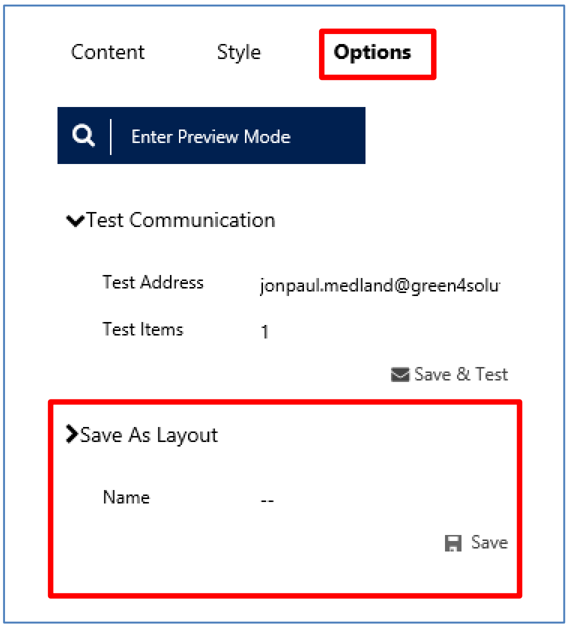
It is possible to save any bespoke layouts that have been created so that they can be used again in the future. When a Layout is saved, it will then be displayed in the Layout section of the Comm Creator so it can be easily selected and reused.

To save a Layout, complete the following:

a) With no content of the email selected choose the **Options** tab in the editing pane.

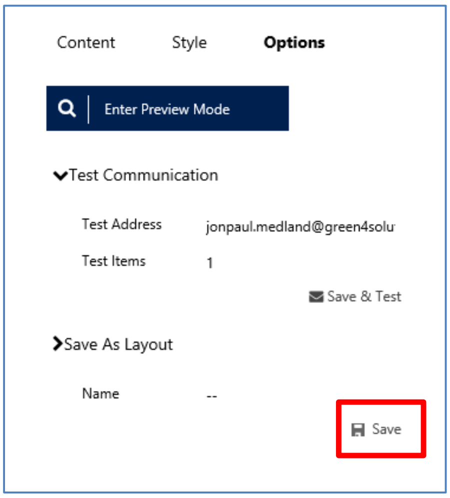


b) Within the Options area, complete the following field:



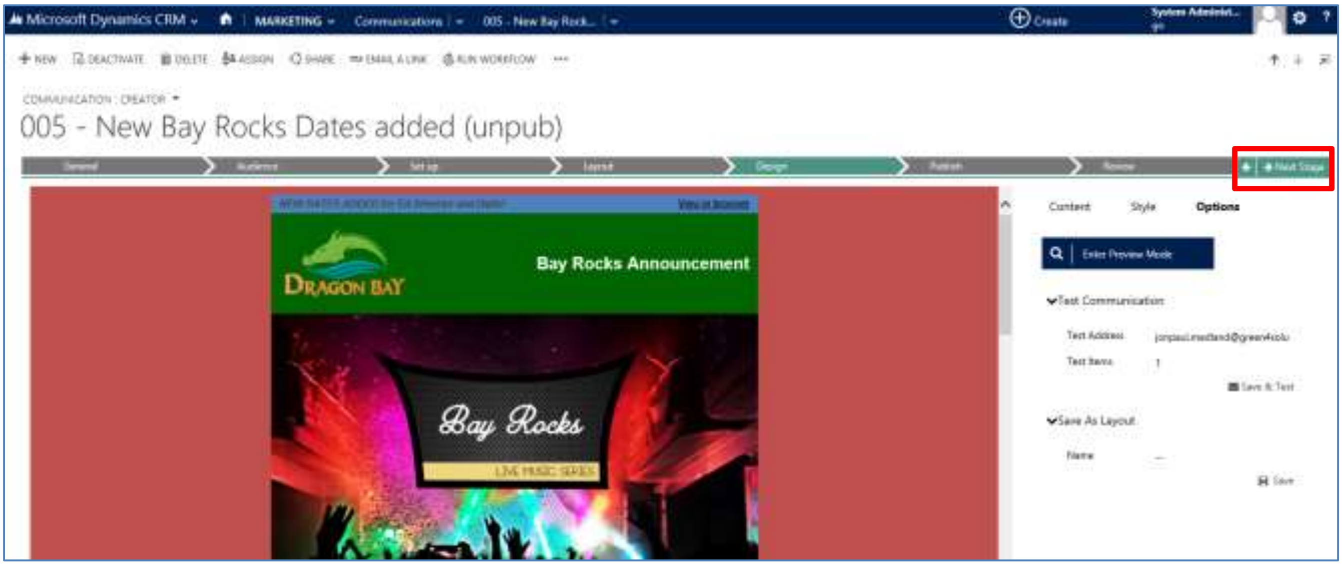
- **Name.** Enter the name that the Layout is to be saved under.

c) When the Name has been inserted select the **Save** button beneath it. The Layout will have been saved and can be selected from the Layout section for future use.



COMPLETING THE DESIGN SECTION

a) Upon completing the Design of your communication, select the **Next Stage** button in the progress bar to advance to the Publish section.



6. PUBLISH

General ➡ Audience ➡ Set Up ➡ Layout ➡ Design ➡ Publish

Upon selecting the Next Stage button in-between Design and Publish, the communication will automatically save itself. It is then possible to either publish the communication immediately or schedule the communication to be sent at a certain date.

Note. If a Flow is being used for the communication there will be no options to publish the communication as this is all controlled by the flow. The only field that will be displayed that is listed below will be the **Expiry URL** field.

a) To publish the communication, complete the following fields:

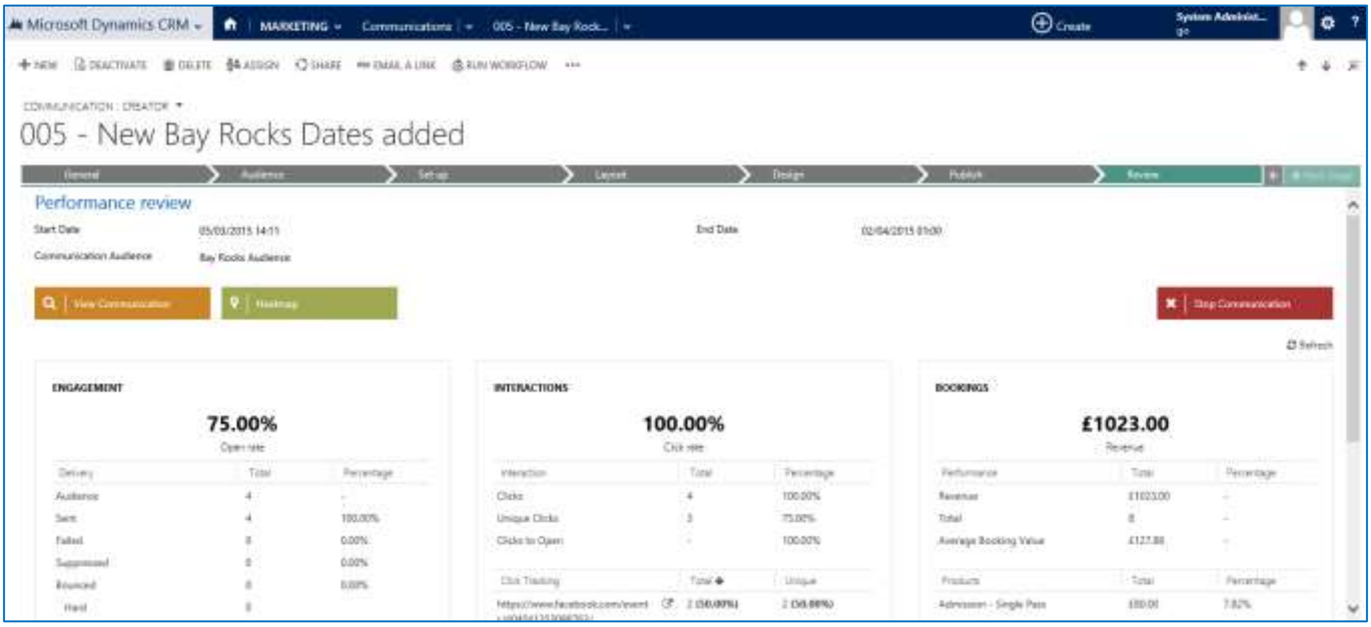
- **When.** Select from the drop down if the communication is to be sent **Immediately** or if it is to be **Scheduled.**
- **Start Date.** This field will only appear if **Scheduled** has been selected in the **When** field. Select the date when the communication is to be first sent.
- **End Date.** Enter the date that the communication is to stop, once the communication stops, the online version of the communication can no longer be viewed.
- **Expiry URL.** Enter an Expiry URL which will be reached once the communication has stopped.

b) Upon completing the Publish section select the **Next Stage** button in the progress bar. A confirmation message will appear, confirming that the communication is set for publication, this will select Publish Communication to confirm that it is to be published. The Review section will now be displayed.

7. REVIEW

The review section gives quick access to key performance metrics in a ready to view dashboard. The review section includes heat maps to see how the communication is performing and all the key statistics that are needed to optimise any future email marketing campaigns. An important point is that the single platform Go solution allows direct revenue attribution for measuring product and promotion performance which can be drilled into for further analysis.

The review section can be accessed any time after a communication has been sent by opening up the relevant communication.



At the top of the review section will be a **Performance Review** section. This displays the following:

- **Start Date.** The date and time that the communication started on will be displayed.
- **End Date.** If applicable the end date and time will be displayed.
- **Communication Audience.** The Communication Audience that is being used for the communication will be displayed.

The orange **View Communication** button also allows the sent communication to be viewed.

HEATMAPS

A Heatmap of a published communication, which displays click through rates can be accessed from the Review area.

a) Within the Review area, select the Heatmap button.

b) The communication will open in a new window. Next to each link within the communication a percentage representing the click through rates will be displayed as is highlighted below. These will be highlighted in different colours depending on the most highly clicked link. The grading goes from blue, to yellow, to orange to red, with red representing the most highly clicked.

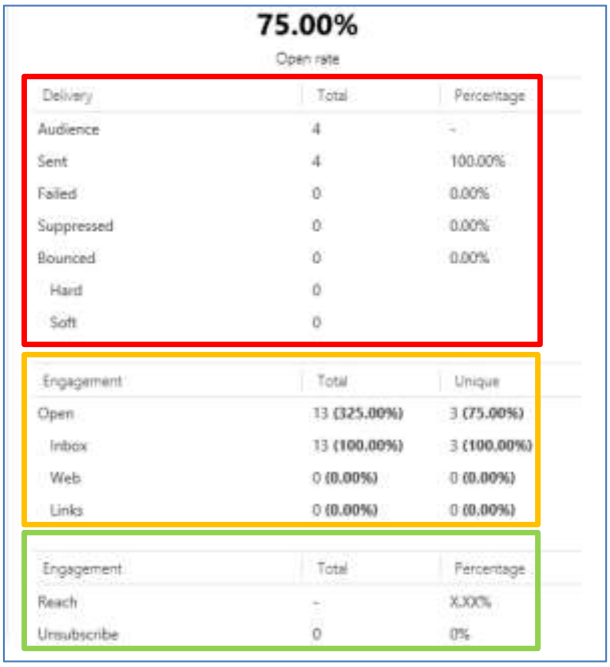
c) By hovering over the click through rate percentage of the communication details will appear showing the following:

- **Total Clicks.** The Total number of links clicked across all recipients, including multiple clicks. Multiple clicks could mean that a recipient clicked on a specific link several times or forwarded the message to others who also clicked.
- **Unique Clicks.** This is the number of unique clicks per link; for example if 2 people click on 3 links 4 times the total clicks is 24 ((3x4)x2) = 24) and the unique clicks is 6 (2x3 =6 so 2 people per link).
- **Destination URL**. The URL of the link which is accessed when the highlighted area is clicked on.

STATISTICS

A range of statistics related to the communication can be seen within the Review area. Engagement, Interactions and Bookings related to the Communication can all be viewed.

- **Engagement.**



75.00%

Open rate

Delivery	Total	Percentage
Audience	4	-
Sent	4	100.00%
Failed	0	0.00%
Suppressed	0	0.00%
Bounced	0	0.00%
Hard	0	
Soft	0	

Engagement	Total	Unique
Open	13 (325.00%)	3 (75.00%)
Inbox	13 (100.00%)	3 (100.00%)
Web	0 (0.00%)	0 (0.00%)
Links	0 (0.00%)	0 (0.00%)

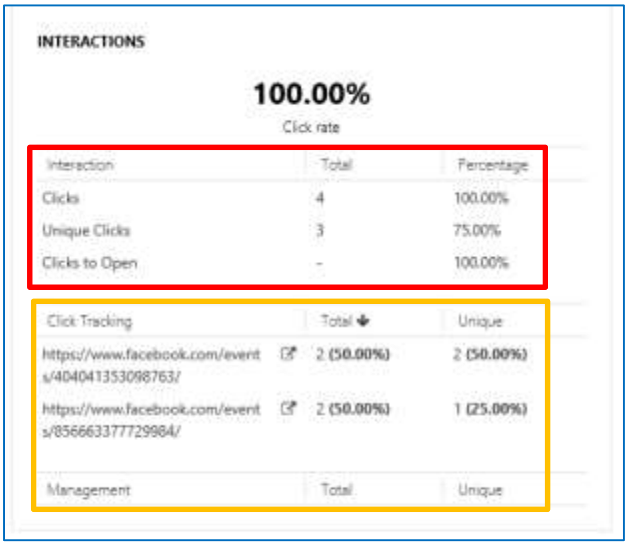
Engagement	Total	Percentage
Reach	-	X.XX%
Unsubscribe	0	0%

The delivery area of the Engagement form shows the stats relating to the delivery of the email. It displays the overall Audience and the number of Sent emails. It also highlights any deliveries that have failed, been supressed or have bounced. These fields are split into; Total and the Percentages of the overall sent total.

The first engagement area displays the open rates of the email. It shows if the emails have been opened via an Inbox, Web or Link. It shows the total amount of these opens whilst also offering a Unique figure, which removes the duplicate opens per contact

The second engagement area displays the Unsubscribe field that gives data on the number of unique contacts that have unsubscribed from the email.

- **Interactions.**



INTERACTIONS

100.00%

Click rate

Interaction	Total	Percentage
Clicks	4	100.00%
Unique Clicks	3	75.00%
Clicks to Open	-	100.00%

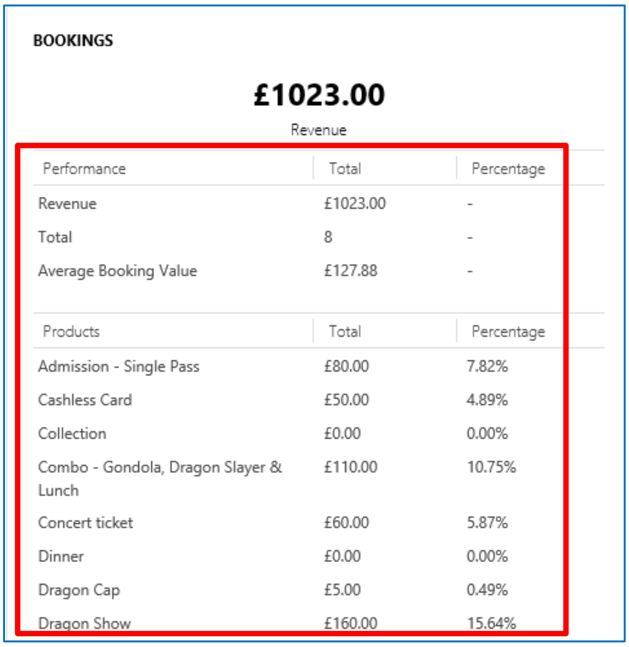
Click Tracking	Total	Unique
https://www.facebook.com/events/404041353098763/	2 (50.00%)	2 (50.00%)
https://www.facebook.com/events/856663377729984/	2 (50.00%)	1 (25.00%)

Management	Total	Unique

The interaction area shows the total number of Clicks from the email including multiple clicks on multiple links. The Unique Clicks fields' highlights the total amount of clicks but duplicate clicks are eliminated. The Percentage of the clicks is worked out via the Sent total number of emails.

The clicks tracking will show any links that have been placed within the email that it is being reviewed. It will shows the total amount of clicks and unique clicks on each link. It is also possible to open up the link by clicking on the icon next to it.

- **Bookings.**



BOOKINGS

£1023.00

Revenue

Performance	Total	Percentage
Revenue	£1023.00	-
Total	8	-
Average Booking Value	£127.88	-

Products	Total	Percentage
Admission - Single Pass	£80.00	7.82%
Cashless Card	£50.00	4.89%
Collection	£0.00	0.00%
Combo - Gondola, Dragon Slayer & Lunch	£110.00	10.75%
Concert ticket	£60.00	5.87%
Dinner	£0.00	0.00%
Dragon Cap	£5.00	0.49%
Dragon Show	£160.00	15.64%

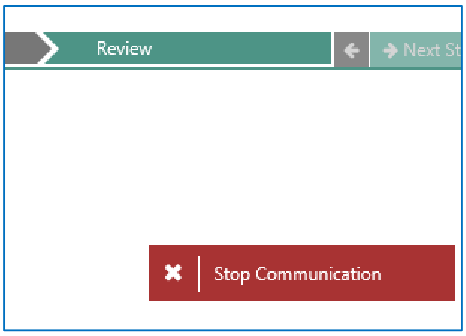
The Bookings area will display the revenue that has been made as a result of a communication. This is linked to the Attribution Tracking field being set to Yes within the Setup section Comms Creator. It will show the products which have been sold due to the communication whilst also highlighting if any promotions from an email have been used to purchase a product.

Note. A tool tip has been added over each of the stats' name making it easy to see what each stat represents.

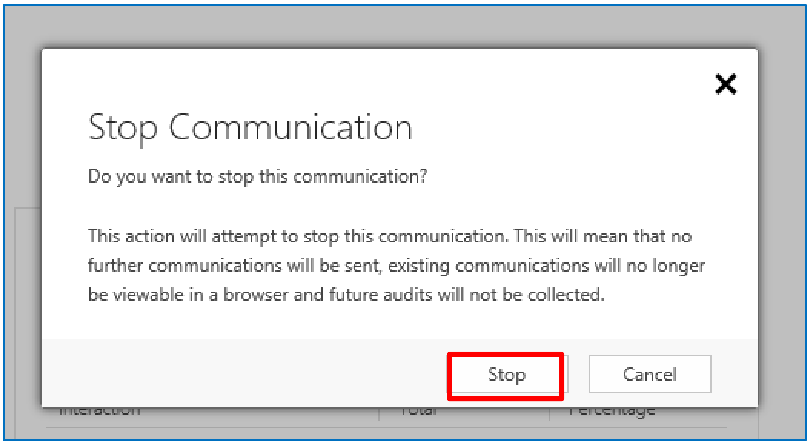
STOPPING A COMMUNICATION

If a Communication must be stopped this is done within the Review area. If a Communication is to be stopped it will redirect any existing communications to the expiry URL.

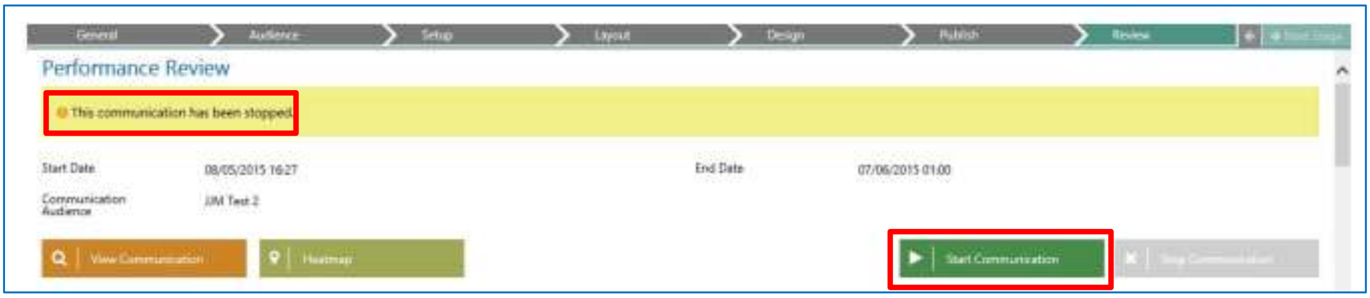
a) To stop a communication select the red **Stop Communication** button.



b) Upon selecting this, a warning window will appear, to proceed and stop the communication select **Stop** in the window.



c) When a communication has been stopped a Communication Status Bar will be displayed at the top of the Review section,



d) It is possible to start a communication again by choosing the **Start Communication** button which will appear once a communication has been stopped.

FLOWS

Marketing automations are becoming increasingly important within Marketing and with Go's Flow builder it is possible to effortlessly create powerful sequences of automated communications that use CRM's data to deliver a targeted message right on queue.

Flows control when a communication is to be sent, for example is this when a customer makes a booking or a number of days before or after an activity is to take place. Alternatively a Communication can be sent on a customer's Birthday. Flows allow businesses to engage with their customers which helps them to improve their overall experience. These can be set up to be both either automated or as part of a campaign. With Go, it is possible to create Flows that you can wait to play out and not intervene.

Flows sit seamlessly within the Marketing area of CRM and the below instructions will demonstrate how to create a new flow.

Note. Flows only control Communications that have had their Audience set to **Flows** with the relevant **Regarding** field selected within the Comm Creator.

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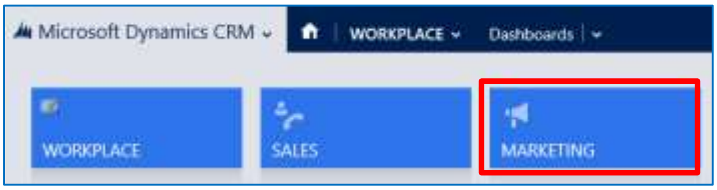
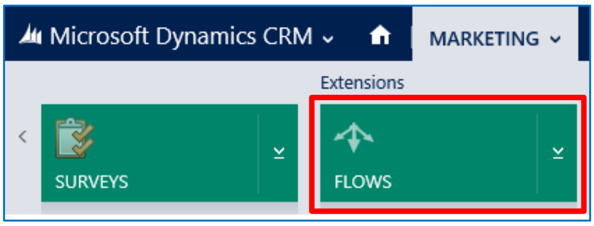
1. CREATING A COMM FLOW

To create a New Flow, complete the following:

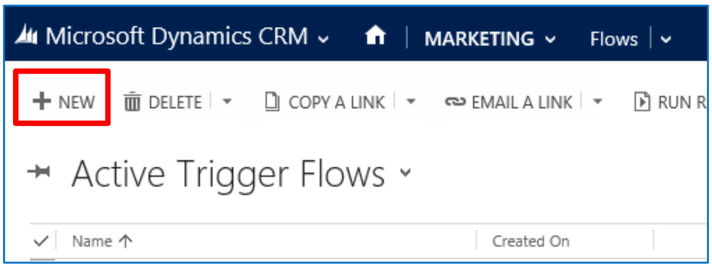
a) Select the **Microsoft Dynamics CRM** tab and from the drop down select **Marketing** in the navigation area.



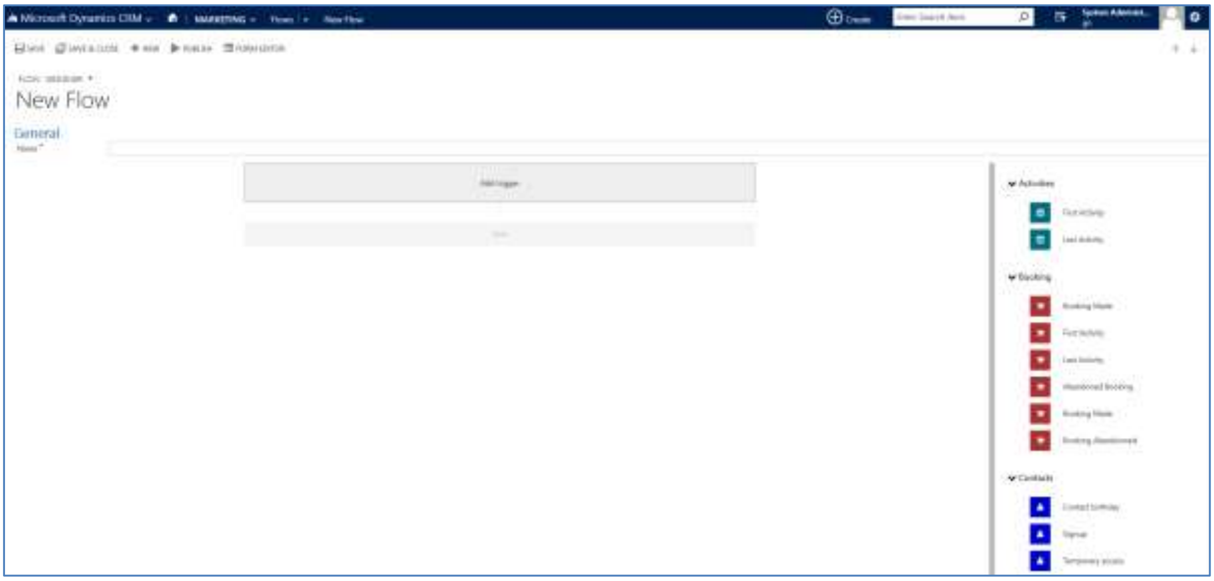
b) In the navigation area select the **Marketing** tab and from the drop down scroll across before choosing **Flows.**



c) A list of any currently Active Trigger Flows will be displayed, select **New** on the ribbon.



d) A New Flow form will open, complete the following Field:



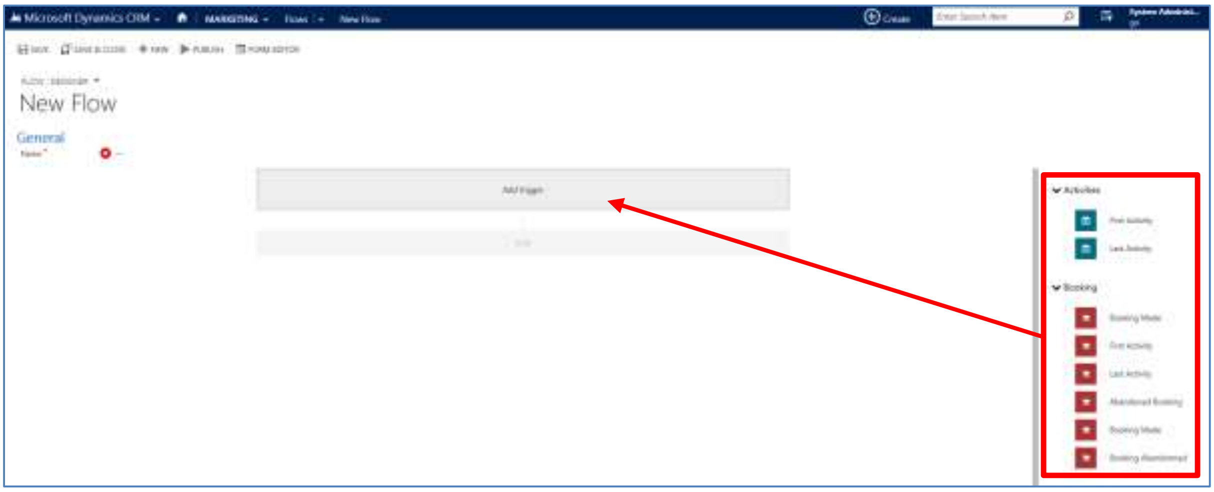
- **Name.** Enter a name for the flow.

e) Select **Save** on the ribbon. It will now be possible to add the triggers that will control the flow.

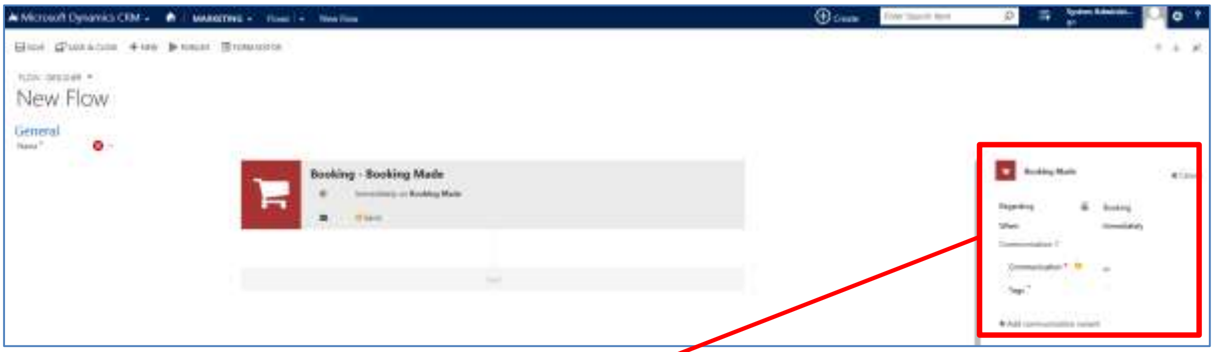
Note. Depending on the Go modules that are available on your system such as Ticketing and Loyalty the triggers that are available to select will differ.

---

f) Next the trigger(s) must be added to build the flow. There are numerous triggers to choose from related to Bookings, Contacts and Loyalty. To add a trigger, simply drag and drop the appropriate trigger from the editing pane into the preview pane on the left hand side.



g) Upon dragging and dropping the trigger into the preview pane, the editing pane will change to make it possible to define a sequence of actions.



h) Within the editing pane for each trigger that is chosen it will be possible to control the following:

- **Regarding.** The regarding field is locked to show what the trigger that has been added is based on. For example a Booking trigger will always be regarding a Booking. This field must also match the Regarding field on the Communication that is going to be using this trigger, this is selected in the Audience section of the Comm Creator.

- **When.** Depending on the trigger that has been selected different options will be displayed from the drop down, such as:

  -Immediately. Select this option if the communication should be sent immediately, such as when a Booking is made or when an auction bid has been made.

  -Before. Select this option if the communication should be sent at a specific time before, such as the day before a Contacts Birthday or the day before an activity is taking place.

  -After. Select this option if the communication should be sent at a specific time after, such as the day after a booking has been made or the day after an activity has taken place.

- **Time.** If the **When** field has been set to **Before** or **After,** then the time field will be made available to choose a certain amount of Hours, Days, Weeks, Months or Years that the communication will be sent before or after an activity or booking takes place.

- **Communication.** Use the lookup to search for the Communication that this trigger and flow is going to send. For example select a Booking Confirmation communication if creating a Booking Made trigger. There are three validation rules for the Communication that is to be chosen:

  i. The Communication must have been **Published.**

  ii. The Communication must have the same **Regarding** entity as the trigger.

  iii. The Audience field within the Comm Creator must have been set to **Flows**.

  If any of the above are not met, the user can continue, however an icon will be displayed with the validation issue.

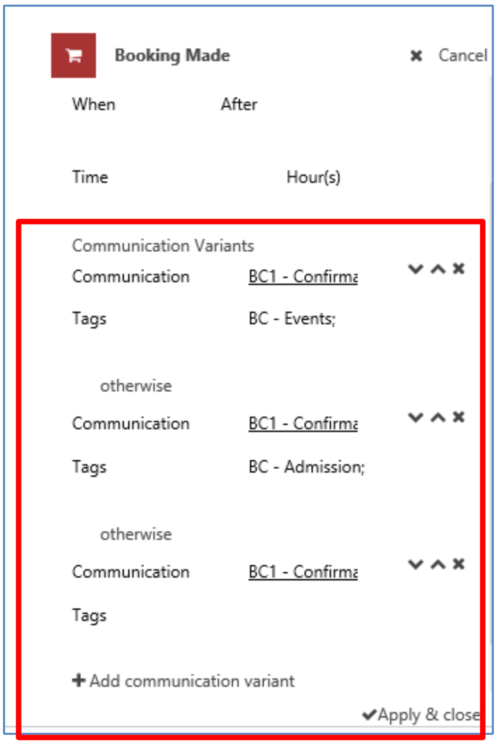
- **Tags.** If applicable, add a tag to target defined segments of your audience using the library of tags. Tags are used to group a product together so that certain groups can be targeted via a communication. This allows tailored communications to be sent based on set criteria such as the type of products that have been purchased. For example a tag can be created that would send a communication to all those contacts that have purchased a certain type of fixture or event.

  Booking and Activity Tags are created as Product Groups, for information on how to create one of these see the Tags and Product Groups section. However it must be noted that these are only used when selecting a Booking Trigger.

  Other tags such as Loyalty and Contact are pre-loaded and do not have to be created. For example if using the Trigger, 'Auction Item End' the pre-loaded tags of 'Winner' and 'Unsuccessful' can be chosen whereas if using the Trigger, 'Contact Birthday' the pre-loaded tags of Male, Female and a range of age categories can be selected.

i) The **Add communication variant** can be used to add additional Communications and Tags to the trigger. If additional Communication Variants are added, they will work as a hierarchy. Therefore this will ensure that those who have already received the communication will not receive it again if more than one of the Tags applies to them.

   The hierarchy works by taking the tap tag within the editing pane and working downwards as can be seen below:



In this example at the top of the hierarchy is the Tag name BC-Events. This means the flow will send the communication to all those who have booked a product that are grouped to this Tag.

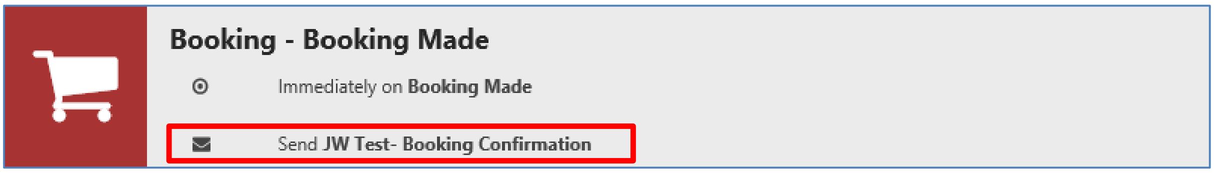
The flow will then send a communication to all those that have booked a product associated to the BC- Admission Tag. If contacts have purchased products together within the Events and Admission Tag the system will know automatically not to send a second communication, as a contact will have already received one as a result of the Events Tag. However anyone who has only purchased a product that is part of the Admission Tag will receive an email.

If the bottom Tag of the hierarchy is left blank this will mean that all contacts who have not received the email so far will then be sent it. If a communication is to be sent to all, only one Communication Variant will need adding with a blank Tag.

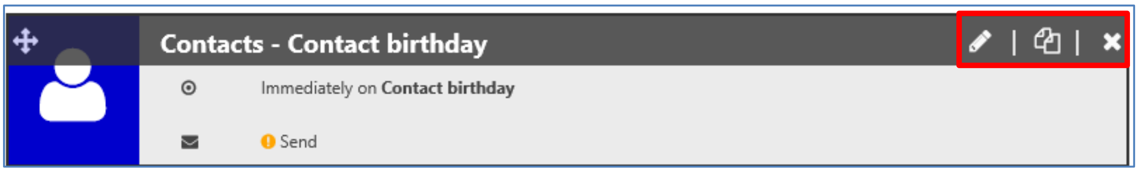
Note. The hierarchy of the Communication Variants can be changed by selecting the small up or down arrow icon next to each Variant. A Communication Variant can be deleted by selecting the cross icon.

j) When the trigger settings have been set. Select the **Apply and Close** button at the bottom of the editing pane.

k) Upon adding the triggers it is possible to preview the communication(s) that is going to be sent as a result of this flow. This can be done by simply selecting the name of the communication in the preview panel as is highlighted below. This allows you to double check that the right communication is being sent to each audience for total piece of mind.

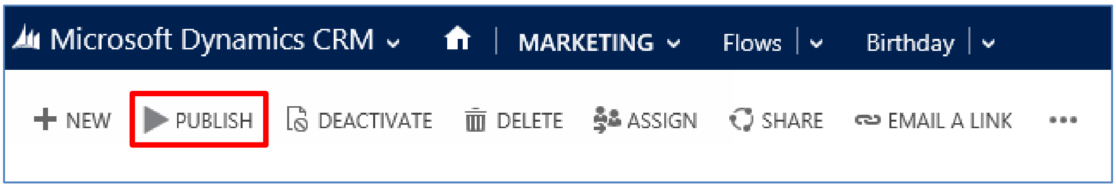


Note. If the Flow has not been published it is possible to **edit** it at any time by hovering over the applicable trigger in the preview pain and selecting the pencil icon that appears. The Editing Pain will then change so that the trigger settings can be changed. Additionally the trigger can be **deleted** by selecting the cross icon after following the same process and a trigger can also be **duplicated** by selecting the double page icon.

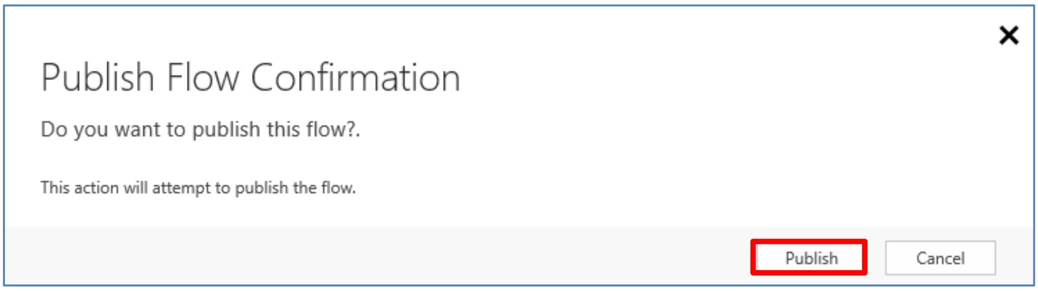


l) Flows can be branched out by repeating the above process of adding additional triggers by dragging and dropping, until all the triggers that make up the flow have been added as can be seen in the Flow Example below.

m) Finally to **Publish** the Flow select **Publish** in the ribbon.



n) A **Publish Flow Confirmation** window will appear. Select **Publish.** When a Flow has been published it is no longer possible to edit the triggers found within it. If there are any validation errors on publishing the communication, these will be displayed so that the user can address them.



Note. When a Flow has been Published it is possible to **Unpublish** it by selecting **Unpublish** in the ribbon. The triggers can then be edited before it can be republished if necessary.

FLOW EXAMPLE

The below example shows a flow that has been set up to be sent immediately to confirm a booking. The flow has then been instructed to then send a communication one day before and one day after the activity the booking has been made for has taken place.

The view of the booking confirmation flow in CRM:

The table below shows what fields within the editing pane have been completed for each trigger that has been added to the flow.

Name: Booking Confirmation					
Trigger	Regarding	When	Time	Communication	Tags
Booking Made	Booking	Immediately	N/A	Confirmation	Admission
				Confirmation	Events
				Confirmation	N/A
First Activity	Booking	Before	1 Day	Day Before	N/A
Last Activity	Booking	After	1 Day	Day After	Admission
				Day After	Events
				Day After	N/A

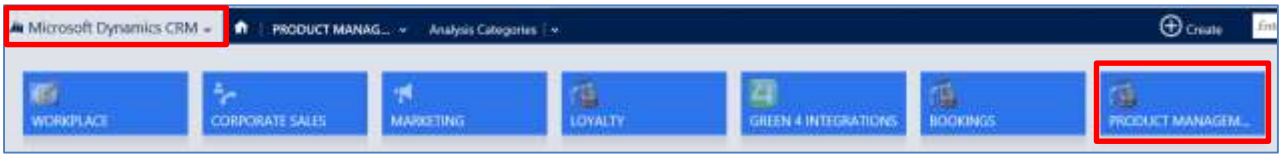
2. TAGS AND PRODUCT GROUPS

Product Groups are used to represent the Tags that can be added to Booking Triggers when creating a Flow. They are used to group products together so that certain groups can be targeted via a communication. This allows tailored communications to be sent based on set criteria such as the type of products that have been purchased. For example a tag can be created that would send a communication to all those contacts that have purchased a certain types of fixtures, events or memberships.

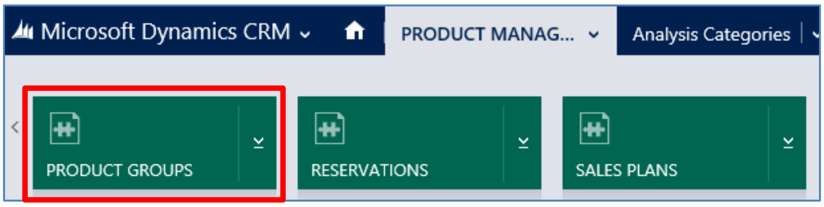
With each communication variant created in a control, it is possible to specify the tags which correspond to each communication. For example, you may want one communication to go to the highest bidder and another to previous bidders. The tags ‘Highest Bidder’ and ‘Previous Bidder’ can be used in this case to define which communication is sent to each. For each control, the tags should be unique for each communication. As such, it is required to add tags for every communication, with exception to the last one, and not one tag can appear more than once. If a communication is specified without tags, it is assumed that this communication will be sent for all remaining tags.

Within CRM Tags are created as Product Groups, to create a Product Group complete the following:

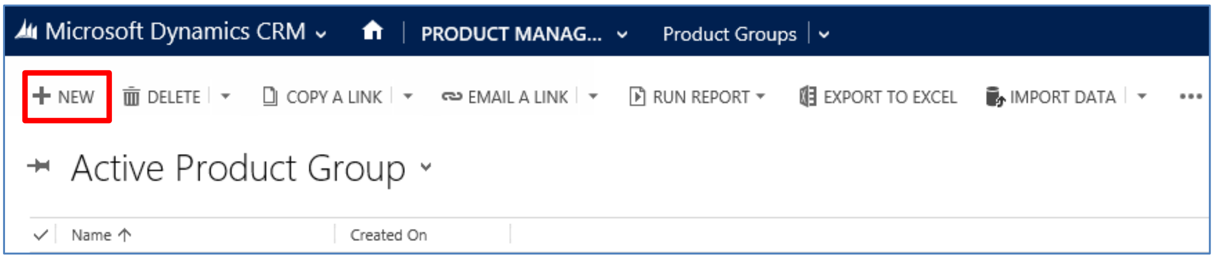
a) Select the **Microsoft Dynamics CRM** tab in the navigation bar and from the drop down choose **Product Management**.



b) Select the **Product Management** tab in the navigation bar before scrolling across and choosing **Product Groups** from the drop down.

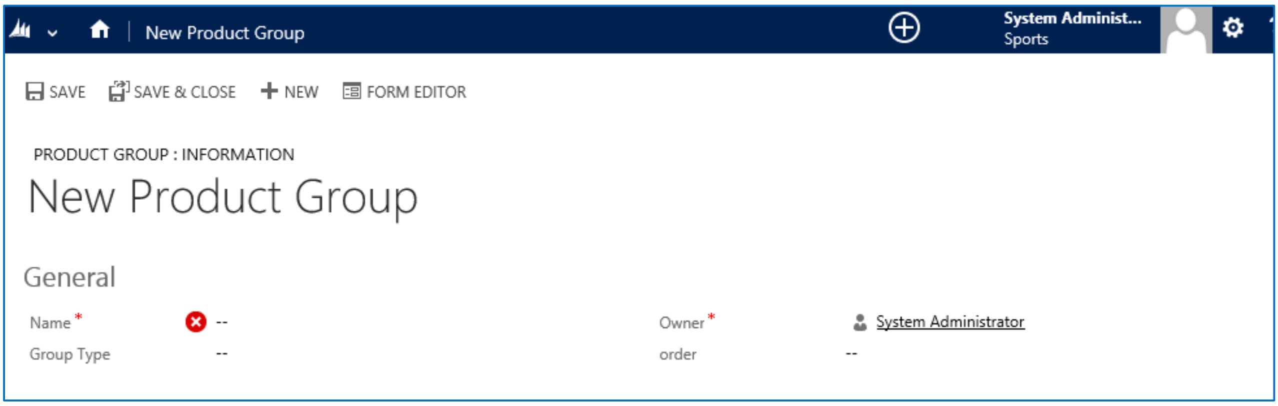


c) Next, select **New** on the ribbon.



d) A list of any currently created Product Groups will be displayed, select **New Product Group** on the ribbon.

e) A New Product Group form will be displayed, complete the following:



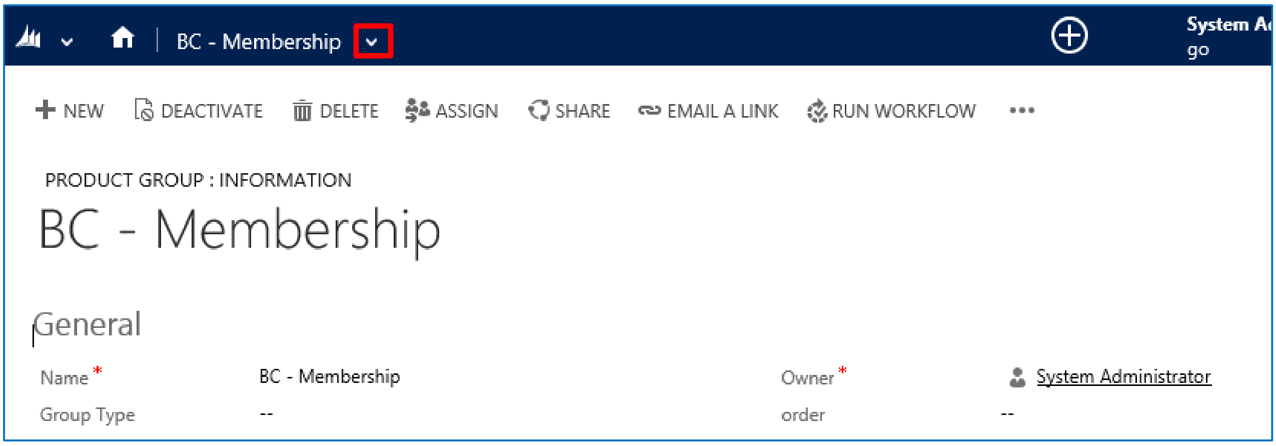
- **Name.** Enter the name of the Product Group.

Note. All other fields within the Product group form do not need to be completed.

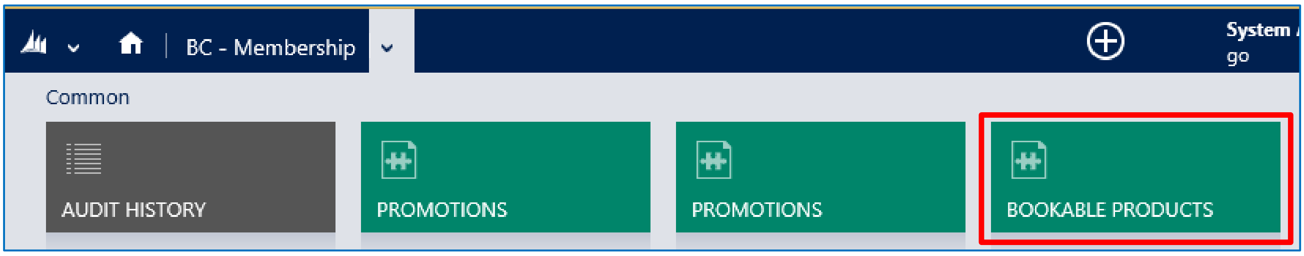
---

f) Select **Save** on the ribbon.

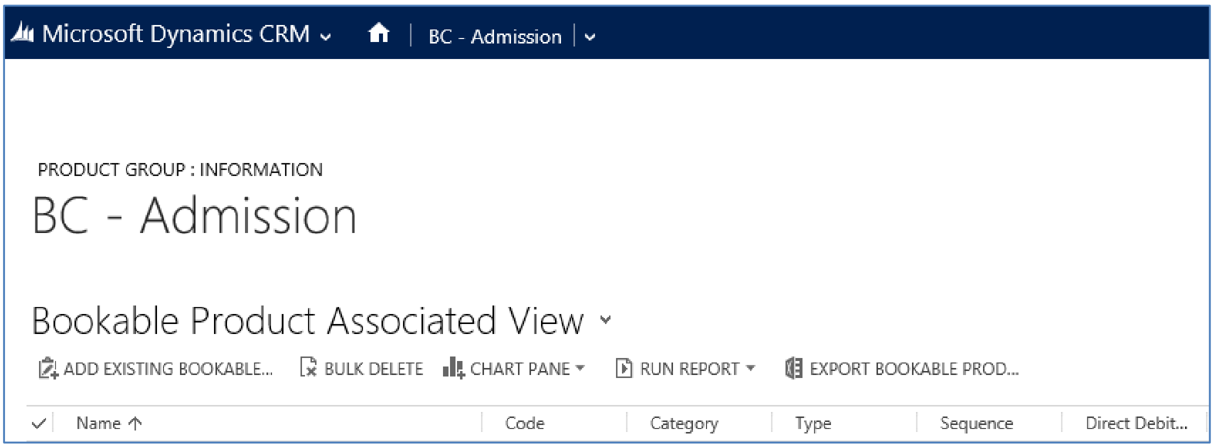
g) Next the products that are going to make up the Product Group must be added. To do this select the small arrow next to the name of the Product Group that has been created.



h) From the drop down select **Bookable Products**



i) The Bookable Product Associated View will be displayed. Select **Add Existing Bookable Product** in the ribbon. Use the text bar to enter the name of the Bookable Product or select the Look Up More Records link to find a Bookable Product that is not listed.



j) The above step can be repeated for each Bookable Product that is to be added to the Product Group. Once all of the Bookable Products have been added to the Product Group, select the **Save** icon in the bottom right hand corner of the screen. The Product Group can now be used as a Tag for a trigger when creating Flows.

APPENDIX

1. CONFIGURATION OF MESSAGE QUEUE

In order to activate the Flows functionality, every CRM organisation requires an individual message queue, which is used to record when a trigger is activated. To access message queuing, on the server where CRM is hosted go to **Computer Management**, then select **Services and Applications** > **Message Queuing** > **Private Queues**. To create a new message queue, right-click **Private Queues** and select **New** > **Private Queue**. The name should be in the format 'g4ematriggers-{org}' where {org} is replaced by the name of the CRM organisation. Without creating this message queue the flows functionality will not work.

2. LINK CONFIGURATION

In order to manage the various links required by the email marketing controls (e.g. image handler link, auction item link etc.) a configuration record must be created within CRM. To do this, navigate to the configuration section (**SETTINGS** > **Configuration**s) and create a new record names **'URLs**' (enter a description if required). In the large text area enter '<urls></urls>' to create the basic xml nodes for this content. Each configuration item should be added inside of the 'urls' tag as a 'url' node with a name attribute and a value. By default, the following nodes should be entered:

<url name="imageHandler">https://.../handler/crmImage.ashx?id={$ItemId}&name=email&c=transparent</url>

The {$ItemId} value will be replaced by the ID for the record to which the note is associated. The note should always be created with a name of 'email'

3. LOYALTY AUCTION BID MADE

The image for Loyalty Auctions bid made, which is displayed in emails, must be created with the subject line '**Email**'. This means that a Note must be created against the Loyalty Auction Item record with this subject line within CRM. Without this, when using the Loyalty Auction control, no image will be displayed, regardless of whether it displays on the web.

The Loyalty Auction Item link should be configured by adding to the existing 'URLs' configuration record. This link should be in the format:

<url name="auctionItem">https://.../.. ?auctionId={$AuctionItemId}</</url>

The {$AuctionItemId} value will be replaced by the ID of the auction item record.

4. LOYALTY REDEMPTION

The image for Loyalty Redemption, which is displayed in emails, must be created with the subject line '**email**'. This means that a note must be created against the Loyalty Reward record within CRM with this subject line. Without this, when using the Loyalty Reward control, no image will be displayed, regardless of whether it displays on the web.

END OF DOCUMENT