



# **QIVOS CLOUD Campaign Manual**

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## 1. Campaigns Overview

Advertising campaigns are built to accomplish a particular objective or a set of goals. Such goals usually include establishing a brand, raising brand awareness and aggrandising the rate of conversions/sales. To carry out a campaign, it is essential to determine its target group, the communication channels it is going to use and its duration.

## 2. Steps

Thanks to QIVOS Cloud (QC) platform, a marketer can set up a campaign quickly and easily. Analytically, to create a campaign, the QC user has to go to the **QIVOS Cloud menu → Campaign Management → Campaigns → Create New** and then follow 5 simple steps.

### 2.1. Setup

The first step is the **Setup**. Here, the user chooses the target group; the available choices are “loyalty member” and “person”

The term “person” refers to the people who have provided their data while the term “loyalty member” refers to those who are, also, part of a loyalty schema in a specific country.

If the “loyalty member” option is selected, the user has to define the desired country and schema. It has to be pointed out that, every campaign can be created for one schema and one country. If more than one country is available in a schema, the user has to create one separate campaign per country. The same applies to cases where more than one schemes exist.

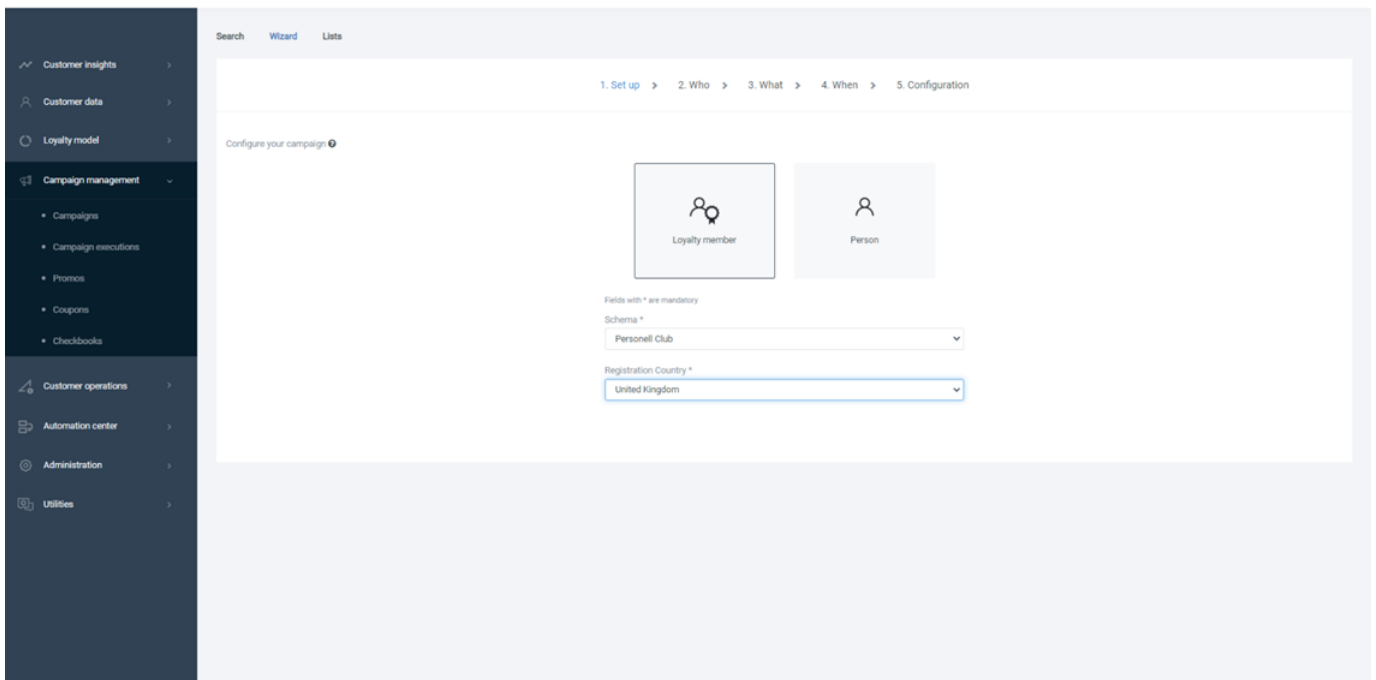


Figure 2.1.1: Setup

## 2.2. Who

In this step, called “Who”, the user determines the campaign’s target group, by:

- a. Adding filters,
- b. Configuring them and
- c. Selecting the percentage of the control group (if any)

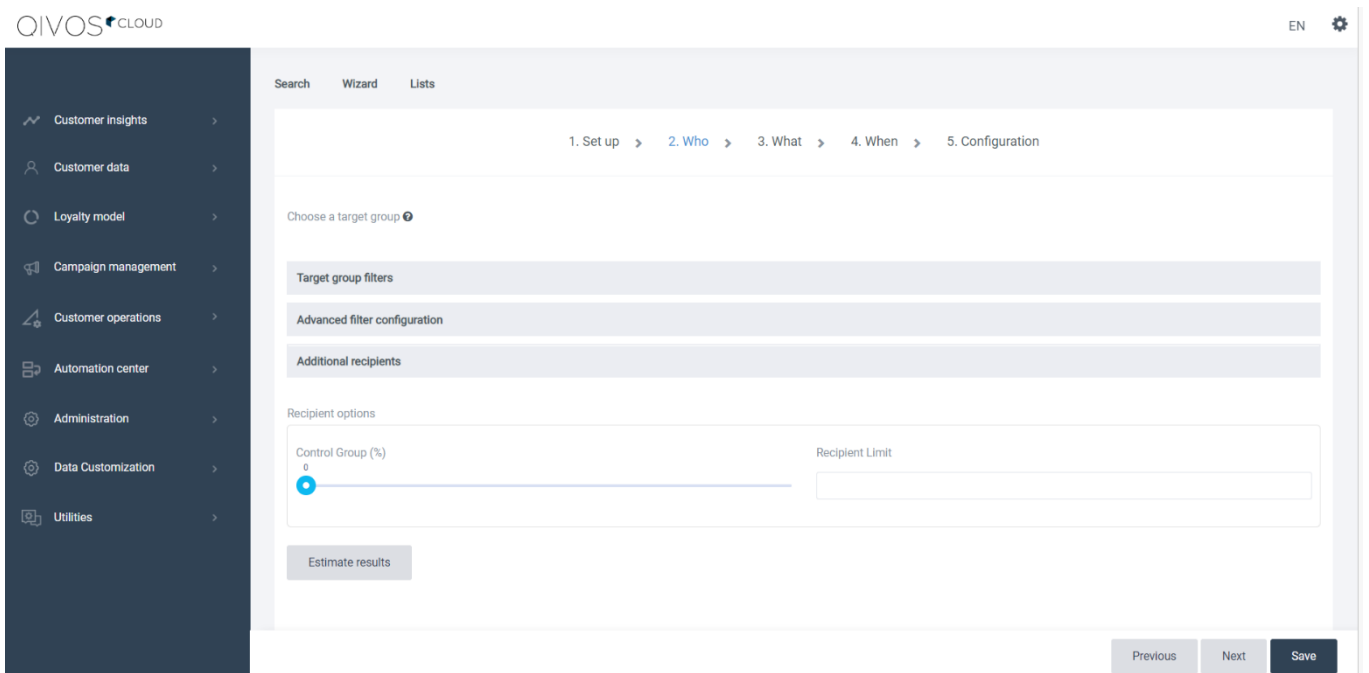


Figure 2.1.1: The “Who” section

a. Add the filters

After selecting “Add new filter”, the user is able to view a list of all available filters, separated in 5 groups:

- i. Personal filters
- ii. Campaign filters
- iii. Transaction filters
- iv. Coupon filters
- v. Other

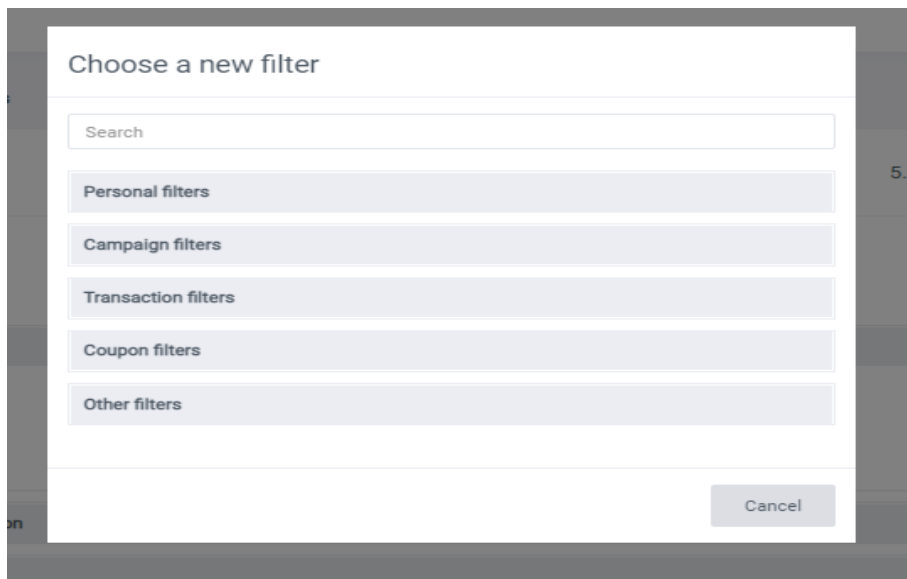


Figure 2.2.2: Campaign filters

The user can find specific filters either by searching them (if the name is known) or by navigating through the categories above. It has to be mentioned that there is not limit concerning the amount of filters added.

b. Specify the filter configuration

Most of the filters have additional configurations that need to be completed. To see the additional configurations, the user has to click on the filter tab. For example, if a campaign has to be sent to a specific age group, the user adds the filter “Age group” and then clicks on the tab to define the age group range.

The table below presents the available filters and the configuration each of them needs.

	NAME	ANALYSIS	CONFIGURATION
PERSONAL FILTERS			
1.	Active loyalty card	All members with an activated loyalty card	No configuration needed
2.	Age Group	The age range	The user selects the member's or customer's age From...To.
3.	Birthday	The member's or customer's birthdate (if available)	The user defines the days before or after the person's / member's birthday

4.	Nameday	The member's or customer's nameday. By checking the "nameday service", namedays that are not static, can, also, be found.	The user selects the days before or after the person's / member's nameday
5.	Bounced email	Emails that cannot be delivered to an email server	No configuration needed
6.	Number of children	The number of children	The user chooses the number of children. There is, also, an option of more, less or equal.
7.	Child birthdate	The child's birthdate (if available)	The user determines the number of days before or after the child's birthday and the maximum age of the child.
8.	Child nameday	The child's nameday. By checking the "nameday service", namedays that are not static, can, also, be found.	The user selects the number of days before or after the child's nameday and the maximum age of the child
9.	Consent	The user can search for a member that has given consent per channel. This should be used, when more than one opt-in per channel is available. Otherwise, the Valid email or Valid mobile filters have to be selected.	The consent channels
10	Contact country-region	The user can find members/customers that have a specific region/s primary address.	The user defines the contact country-region address
11	Gender	The gender type	the user checks Unknown, Male or Female. More than one can be selected
12	Member notification device	The user finds the members to which a push notifications from a mobile App can be sent, since the needed information regarding their device has been provided.	No configuration needed
13	Member source	The way through which the member has registered (e.g., ESHOP, POS, MOBILE_APP)	The user selects the desired member source/sources
14	Person notification device	The user finds the customers to which a push notifications from a mobile App can be sent, since the needed information regarding their device has been provided.	No configuration needed
15	Person source	The way through which the person has registered (e.g., ESHOP, MOBILE_APP)	The user selects the desired person source/sources
16	Preferred language	Person's or Member's language of preference	The user chooses the preferred language / languages
17	Preferred store	The store that member/customer prefers to purchase from. This information is stored either from visits or from the registration form, depending on the business.	The user selects the preferred store/stores
18	Registration store	The store, in which the user registered	The user selects the registration store
19	Valid email	The correct and opt-in primary email	No configuration needed
20	Valid mobile	The valid and opt-in primary mobile	No configuration needed
21	Valid personalize	Valid personal information like last name, first name, and salutation. This filter can be used to ensure that the same placeholder will have data on the messages.	No configuration needed

CAMPAIGN FILTERS			
22	Campaign e-mail reporting (clicked)	The people that have clicked the link, for a specific email campaign that has already launched	The user selects the campaign and the time period
23	Campaign e-mail reporting (opened)	The people that have opened the email, for a specific email campaign that has already launched	The user selects the campaign and the time period
24	Campaign In-App-message reporting(clicked)	The people that have clicked the link in an In-App-message, sent by a previous campaign	The user selects the campaign and the time period
25	Campaign In-App-message reporting (opened)	The number of people that have opened an In-App-message, sent by a previous campaign	The user selects the campaign and the time period
26	Campaign participants	The people that have participated in a specific campaign, during a particular period of time. This campaign can be excluded, when NOT IN operator is used.	The user selects the campaign(s) (name, category, active/deactivate) that the member/person received this year or this month, or some days or months ago. The user can even select the campaign they currently making and avoid using the “have already received this campaign” filter in order to achieve maximum efficiency.
27	Campaign Push Notification reporting(clicked)	The people that have clicked on an out-of-application notification, sent by a previous campaign	The user selects the campaign and the time period
28	Have already received this campaign	The people that have already received this campaign this year or this month, or at least once in the last days or months. This filter is used to exclude all participants that have already received the same campaign (in automated campaigns).	The user defines the time period in days or months, during which the member has received the campaign.
29	Have received a number of campaigns	The people that have received less equal or more than a specific number of campaigns, via a given communication channel either in that specific day or during a particular period of time. This filter does not take into account members who have <b>not</b> received at least one campaign based on the selected communication channel.	The user selects the communication channel, the comparator and the number of campaigns. There are 2 ways to define the execution period; current day or date range.
TRANSACTION FILTERS			
30	Invoice	The people who have received an invoice either with a specific invoice number or during a specific period of time.	The user determines either the invoice number or the period of time the transaction took place.
31	Member/Person instore invoice	The user can find if the member/customer has purchased something in a particular period from a specific store.	The user defines the invoice store and the time period in either days/month or date range type.
32	Member/Person inregion invoice	The user can find if the member/customer has purchased something in a particular period and in a specific region.	The user defines the region and the time period in either days/month or date range type.
33	No transaction	The people that have not purchased anything during a specific period of time.	The user determines the days/months without a

		The selection can be narrowed down to specific stores.	transaction and the invoice stores.
<b>COUPON FILTERS</b>			
34	Coupons expiration	Members that have a specific coupon-set and the coupons expires at a particular time.	The user selects the coupon-set and chooses either the days until the expiration or the expiration date
35	Coupons	Members that have a coupon from a specific coupon-set and is given or/and used at a particular time. There is, also, the option to add coupon or coupon-set attributes.	The user selects the coupon-set and defines the duration type either in Days or a specific Date.
<b>OTHER FILTERS</b>			
36	Attributes*	Specific member attributes could be used as filters based on selected type: Integer, string, date, boolean	The user selects the type and the attribute.
37	CSI Average Score	The average score range of the Customer Satisfaction Index.	The user defines the minimum and maximum
38	Custom List	Segmentation is done by choosing an existing list or creating a new one of members'/persons' IDs. This can be a list that has been uploaded from a different system or a list that has been created using the "Add to list" QC functionality on every member's/customer's profile.	The user either chooses an existing list or creates a new one, by defining its name, type and notes
39	Customer Attributes*	Specific customer attributes could be used as filters based on selected type: Integer, string, date, boolean	The user selects the type and the attribute.
40	Expired members	Members without an invoice for two years (the time period may change per business).	No configuration needed
41	Loyalty card type	Segmentation is done based on member's card type: unknown, temporary, permanent	The user chooses the card type (unknown, temporary, permanent)
42	Member category	Segmentation is done based on the member's category	The user chooses the member's category, depending on each schema (e.g., normal, employee, VIP, tourist)
43	Member data entry date	Members that have been inserted into the QC Platform via DEF in a particular period of time (Data Entry Form – DEF – is a prerequisite).	The user defines the period of time (more than, less than, equal) and days/months or date duration.
44	Member mobile login	The user can find the members with which connected via mobile for the first time, during a particular period of time.	The user defines the period of time (more than, less than, equal) and days/months or date duration.
45	Member registration date	Members who have registered on a predefined period of time.	The user defines the period of time (more than, less than, equal) and days/months or date duration.
46	Member social media likes	Segmentation based on likes made in a period of time (Days/Months from) or a certain date (Date from). This requires a configuration of the client social page and will find members that had liked posts in a particular date range.	The user selects the social media account and the period of time (more than, less than, equal) and days/months or date duration.

47	MTV Analysis**	The last MTV segments	The user chooses the MTV segment/segments.
48	No check - in	The members without an in-store check-in, during specific days/months.	The user sets the days/months without a check-in
49	Plastic Loyalty Card	Members that had to receive a plastic card from a specific card batch.	The user sets the days/month range or date range of the card batch creation.
50	Point log expiration	The members whose points are going to expire in a specific days/month range or date range. This can be used to send a message to these members notifying them that their points are about to expire or to ensure that the campaign will be sent to members whose points will not expire in the next days.	The user sets the days/month range or date range
51	Pointlogs	The members that received a specific type of points during a period of time.	The user defines the type of points received and the days/months range or date range.
52	Points	The member's available points at the time the campaign will be launched.	The user determines the number of points (more than, more than or equal, equals, less than, less than or equal).
53	RFM Analysis***	The last RFM segments	The user chooses the RFM segment/segments.
54	Tag	Members / Customers that have or had had for a particular time a certain tag	The user defines the tag and the days/months range or date range.

\* **Attributes** are features that are designed specifically for each loyalty schema. To target members with specific attributes in your campaign, select the filter Attribute and then the type of the Attribute (INTEGER, BOOLEAN, STRING, DATE).

\*\* **MTV analysis** is an advanced segmentation method which analyzes multiple variables from the customer database to get a deeper understanding of consumers' behavior and categorize them into homogeneous groups. For example, members of a rewarding program can be categorized by analyzing their behavior based on different factors, such as spending on a particular product or in a particular period (that of discounts). This results in the creation of groups such as "brand lovers" or "price sensitive", that can be used as campaign filters.

\*\*\***RFM analysis** is an advanced segmentation method that categorizes the customers in 6 clusters based on three basic metrics: Recency, Frequency and Monetary. (For more details, please open the QC manual and see the module 3.7, which is called "RFM configuration")

\*\*\*\***Tag**: By assigning a tag to specific members of a loyalty schema, the QC user is able to run a particular action, just on them, or to underline a special characteristic they have that needs to be taken into consideration.

By default, the filters are joined with the **AND** operator. This means that the only recipients that will receive the campaign will be these who fulfill all of the criteria added in the filters.

In cases when the user needs filters to be applied disjunctively, the "Advanced *Filter Configuration*" can be used, for combining **filters with the operators below**:

**AND:**

The operator AND narrows the search by instructing the search engine to search for all the records containing the first keyword, then all the records containing the second keyword, and show only the records that contain both.



For example, if a campaign needs to include members who are in the white tier and have a valid email, the user will add the filters “Member Category: White” (defined as Member category 1) and ‘Valid Email” in the filter panel and then use the AND operator as shown below:

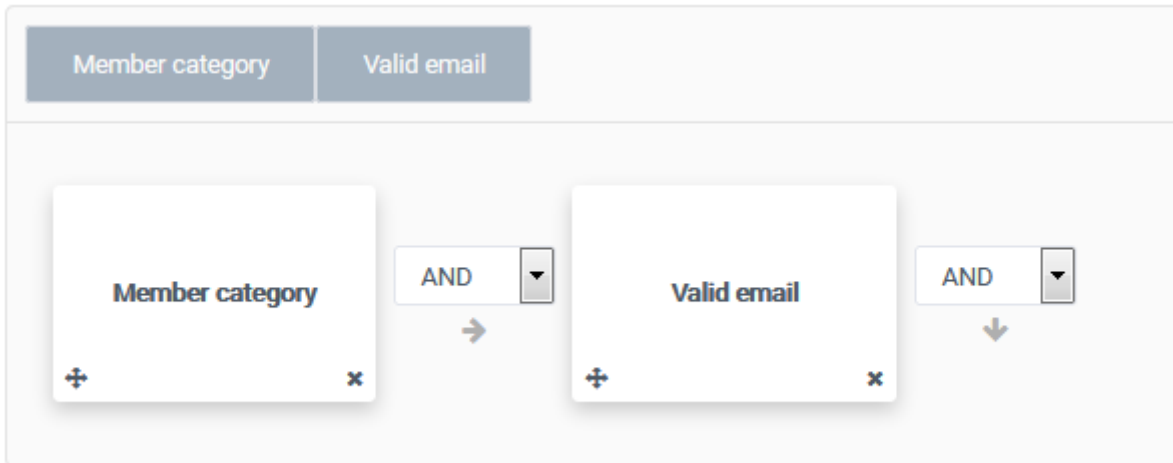


Figure 2.2.3: “AND” Operator

**OR:**

The operator OR broadens the search to include records containing either keyword or both. The OR search is particularly useful when there are several common synonyms for a concept or variant spellings of a word.

For example, if the campaign needs to include both members who are in the black tier and members who are in the white tier, the user will add the filters “Member Category: White” (defined as Member category 1) and Member Category: Black” (defined as Member category 2) in the filter panel and then use the OR operator as shown below:

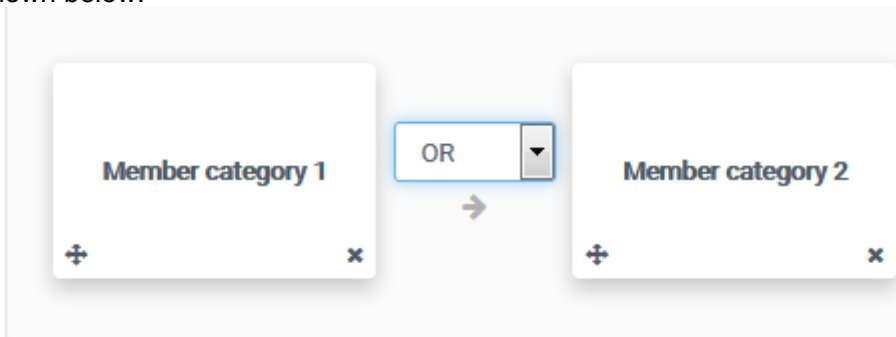


Figure 2.2.4: “OR” Operator

**NOT IN:**

Combining search terms with the NOT IN operator narrows the search by excluding unwanted terms.

For example, if the people with a bounced email have to be excluded from the above communication, the user will add the operator NOT IN and the filter Bounced email after that as shown below.

**Configure the groups, order and operators of the filters. ?**

Configuration group 1

Member category 1	Member category 2	Bounced email
-------------------	-------------------	---------------

Member category 1 OR Member category 2 NOT IN

Configuration group 2

Member category 1	Member category 2	Bounced email
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Bounced email -

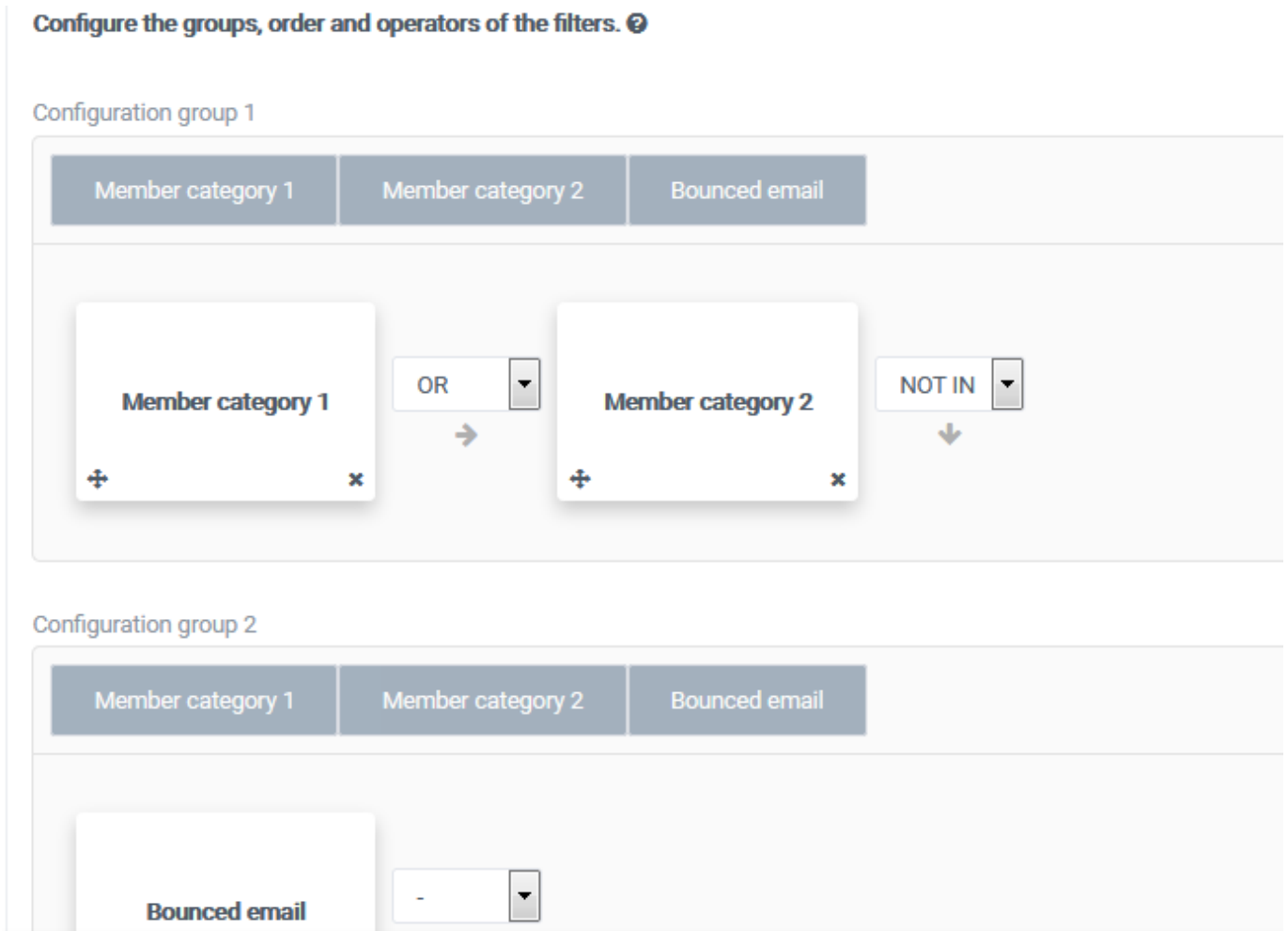


Figure 2.2.5: "NOT IN" Operator

It is advisable to add a new configuration group every time you change the operator. Moreover, once all filters have been added, the operator "-" should be added in the end.

c. Choose the control group

The basic idea of a control group is simple. A random (or nearly random) sample from a campaign's marketing list is selected and excluded from the promotion. Then, the control group's activity is measured and compared to the activity of the group targeted via the campaign.

By using the "Additional Recipients" option, the user can, also, add a list of participants that will always be included in this campaign (In other words, they cannot be excluded from the control group).

After completing the segmentation, the "Estimate results" button should be clicked, in order for the count of the campaign's recipients (supposing it will be executed now) to be shown. The user, can, also see a sample of this segment by pressing the View sample button; there is a refresh button as well, in order to get a different sample.

## 2.3. What

In this step, called "What", users decide what the campaign will do. The available options are shown below:

1. Send SMS

Users select the SMS provider and the language in which the message will be sent. Then they need to place the text in the area below. There is an option to add placeholders like FirstName, card number, points, coupon expiration etc. which will appear in the text. For example, if the placeholder 'FirstName' has been selected, the recipient's first name will appear in the text.

2. Send Email

Users select the provider and the language in which the message will be sent. In the URL template, users have to add a public URL of the email template. They can, also, add an additional URL if the first is not accessible. Moreover, users must provide the subject, sender name and the email address. Finally, the days before and after execution can be used to add numeric values, that will replace the placeholders *dateFrom* and *dateUntil* with a date. This can be used to communicate one date and give silent extend for a coupon.

3. Send Viber

Users choose the Viber account and creates the message with placeholders, images, and links. There is, also, the option of SMS fallback, so that the recipient can receive an SMS in case that the Viber has not been delivered. Lastly, users can track the clicks by checking the related checkbox

4. Send Push Notification

Push notifications are messages that are sent directly to a user's device, even when the app is not in use. It is required to select "Global Firebase" as the Vendor and to add the title and the body text of the push notification. Generally, it is advisable to be brief in order to catch the users' attention.

**NOTE!** In the Who section, it is necessary to **add the filter "Member Notification Device"** which is one of the Personal Campaign Filters. This filter does not need any further configuration.

5. Send In-App Message

Users select the "QC\_Message\_App integration" as the In-App account and the language in which the message will be sent. It is required to add the title and the body text of the message. There is, also, the option to add placeholders (as explained in the "Send SMS" section) images and links. Each image has to be uploaded using .png or .jpeg file formats and it needs to be at most 3000 pixels wide & 3000 pixels high. It is advisable to add a square image. However, in case that is not possible, it better be uploaded in landscape orientation. Finally, the users have the option to add a button which will direct people either to an external website or somewhere inside the app. For the first to be realized, the users should fill in the blank called "Link" with the external link they want, while, for the second, they should type a "/" followed by the name of the page they want. In case they do not know the name, they might ask the responsible developer.

**NOTE: It is suggested to create different campaigns for sending Push notifications and In-App Messages.** That is because it facilitates the reporting procedure and it avoids the exemption of members that, although they cannot receive a Push Notification since the "Member Notification Device" filter excludes them, they should receive the In-App message campaign.

6. Give Coupon

Users select a coupon set and the days or date of coupon expiration. By default, on campaign execution, the coupon will be generated and bind to the member. If they want to use coupons that already exist in an available coupon set, users have to check the "Use available coupon", while if they want to give pre-assigned coupons (coupons that have been already assigned to members without them being informed), the "Give pre-assigned coupon" option has to be checked. Users can, also, "remind member for coupon" or carry out a "Custom coupon action".

7. Give Points

Users have to select the point source (such as registration, purchase, birthdate points) and fill out the points that will be given to campaign participants.

8. Create a list

Users set the list's name that will be created every time this campaign will be launched. This option is useful for cases in which users want to pre-check the recipients of a specific campaign that is going to be launched in the future.

9. Record

This option is used, when users want to record the results of a campaign without actually executing the campaign. This may be used in cases in which a campaign is executed from another system.

10. Give tags

Users will assign a tag to each of the campaign's participants. They have to choose the tag and its duration.

11. Trigger Flow

Users select the flow that they want to trigger.

12. Add Attributes

Users select the type (INTEGER, STRING, BOOLEAN, DATE), code and value of the Member or Customer Attribute they want to add to the recipients of this campaign. At this point, it has to be underlined that attributes are customized fields that differ per customer and store specific members' characteristics that are not part of the CORE QC model.

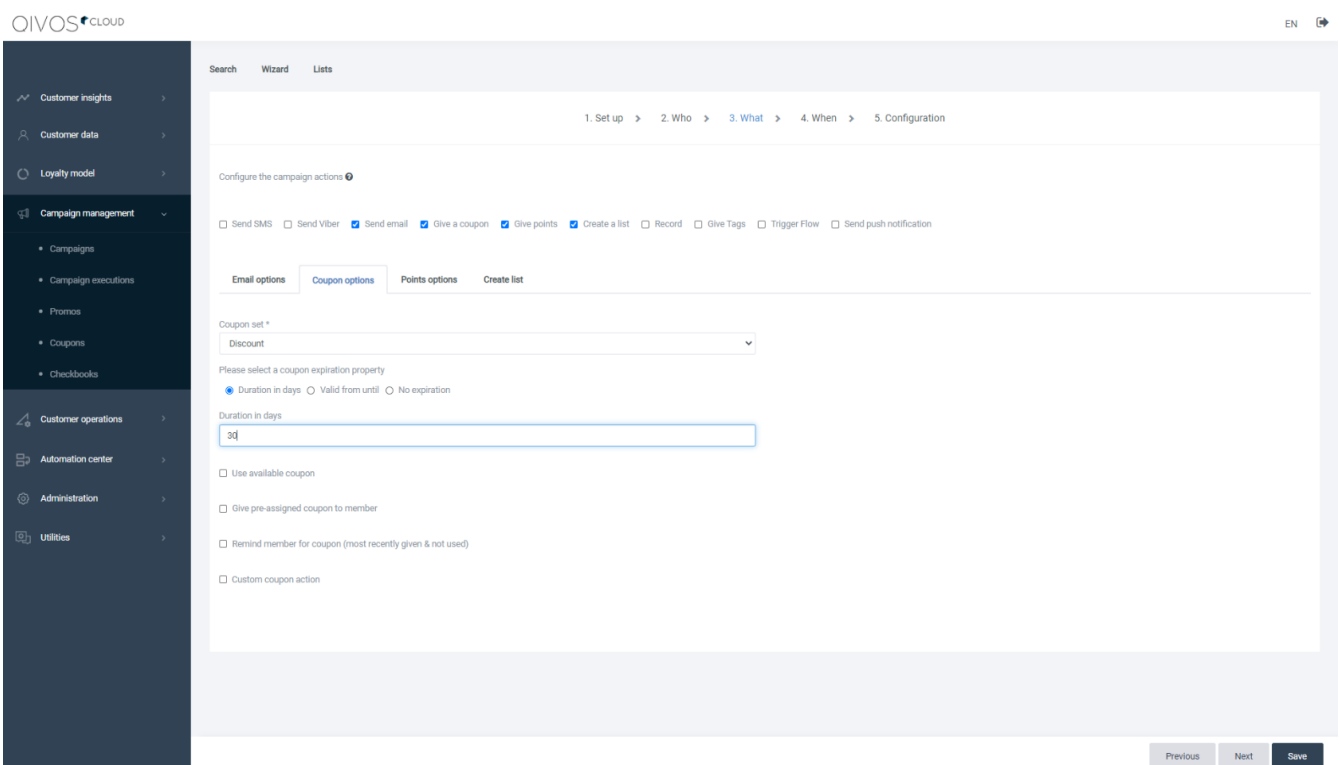


Figure 2.3.1: The "What" section

## 2.4. When

In this step, called “When”, the user defines when the campaign should be launched. The available options appear below:

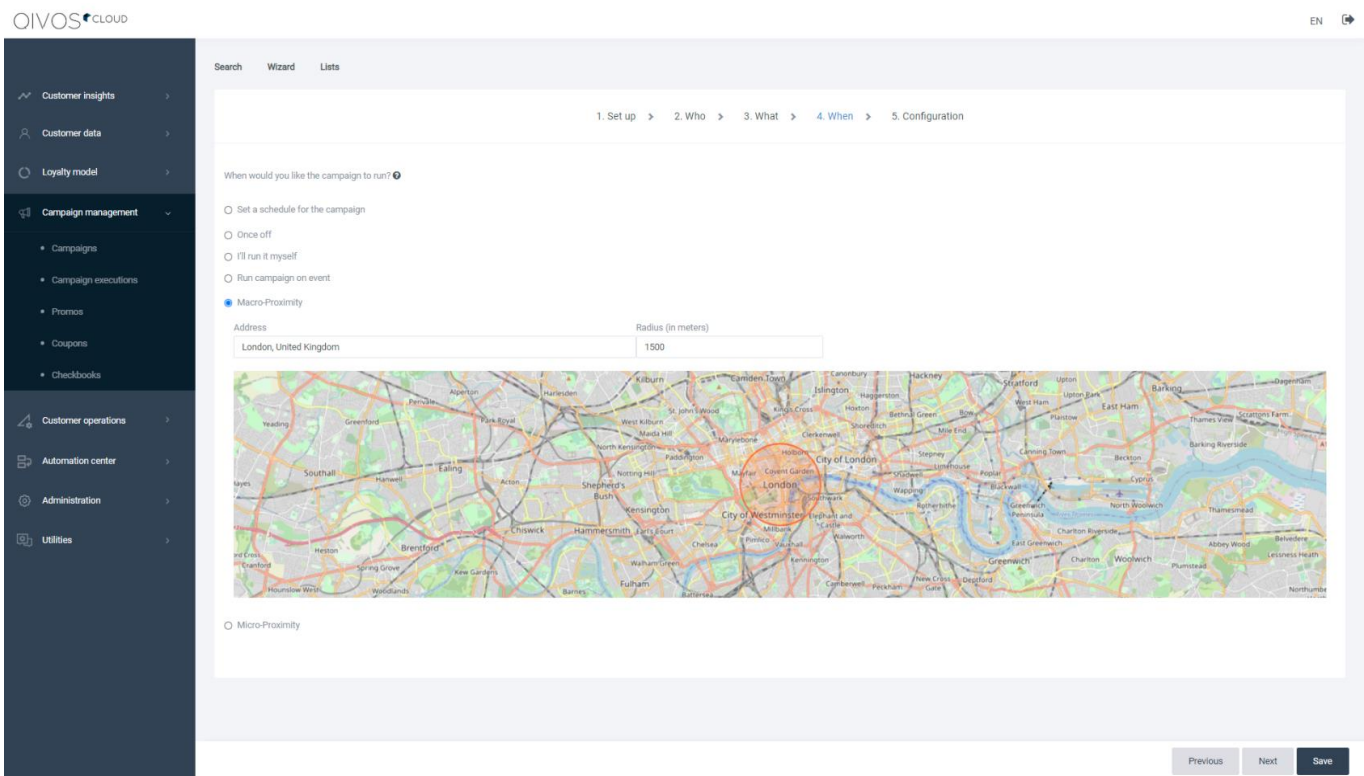


Figure 2.4.1: The “When” section

- **Set a schedule:** The campaign will be executed every Hour/Day/Week/Month/Year. There may be multiple schedules.
- **Once off:** The campaign will be executed in specific dates and times
- **I'll run it myself:** This campaign will run only manually; the user will need to use the Send button on the campaigns result page.

When a campaign is scheduled, for example every Monday at 1 pm, it will run between the start date and the end date determined by the user in the setup section. Although every QC has its own time zone, the user can change it when choosing the “schedule” and “once off” options.

## 2.5. Configuration

In the last step called “Configuration”, the user sets the name (it has to be unique), the category and the description of the campaign. A start and end date can be also selected if a particular time frame for the executions needs to be set.

It is advisable for the user to select export fields, in order to export the execution of the campaign.

Additionally, there is a status option.

All created campaigns that have been saved have “**In design**” status; there are no validations till the status is changed. In this status, the campaign cannot be executed. In the “**Ready to test**” state, the campaign SMS or Email can be **tested**, by selecting a contact list of recipients and send them the message. Before every test, the campaign is autosaved. When the campaign is ready, the user sets the Campaign status to “**Ready to Launch**” and saves the campaign. Next, the user clicks the arrow in the Campaigns’ description and types “SEND”. The campaign is then Launched. When the campaign has a scheduler, it will only run when the status is **Ready to launch** or “**Launched**”. It is strongly recommended not to make any edits to a launched campaign.

However, if a user has launched a scheduled campaign and wishes to make edits, the changes will take effect from the next execution and onwards.

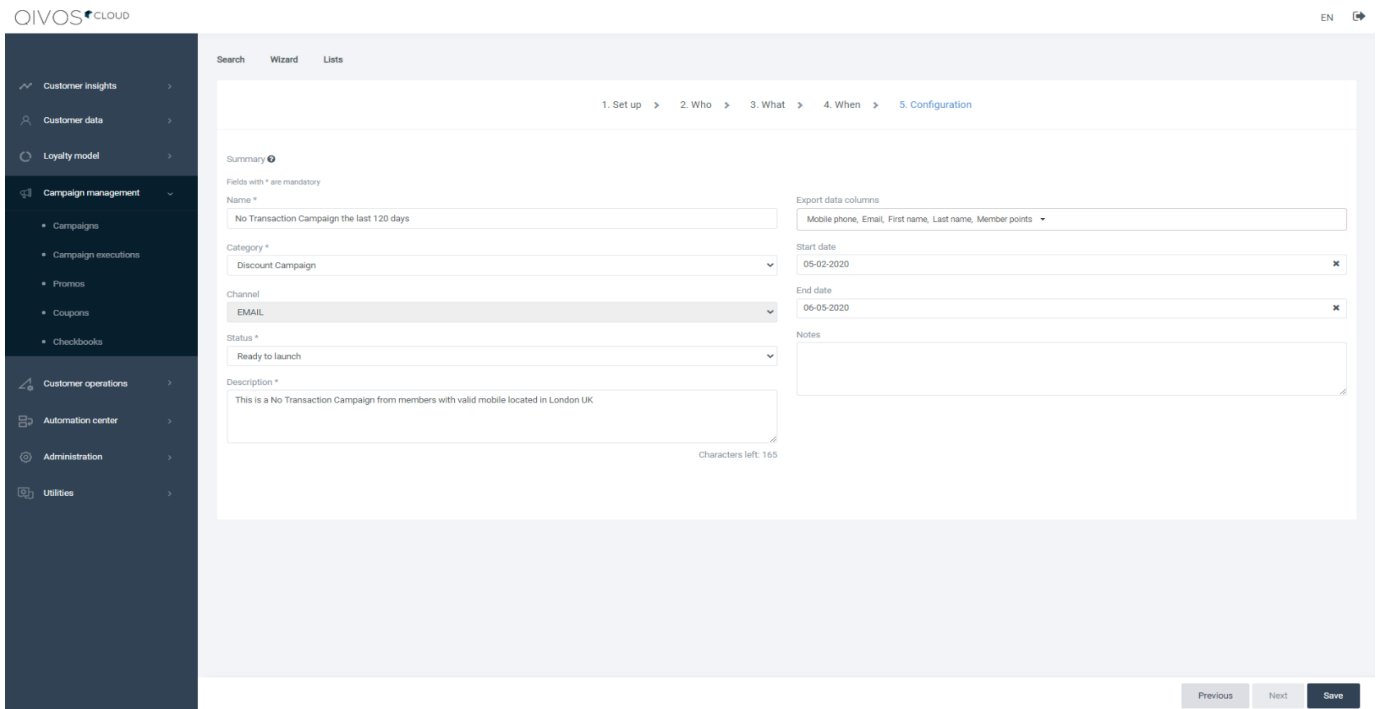


Figure 2.5.1: The “Configuration” section

Lastly, users can prioritize their campaigns based on urgency and importance and ensure that small campaigns will not be delayed due to extensive ones running in parallel and competing for shared resources by selecting the desired level of priority (LOW, NORMAL, HIGH) from a drop-down menu in the section named “Campaign Priority”, as shown in the figure 2.5.2

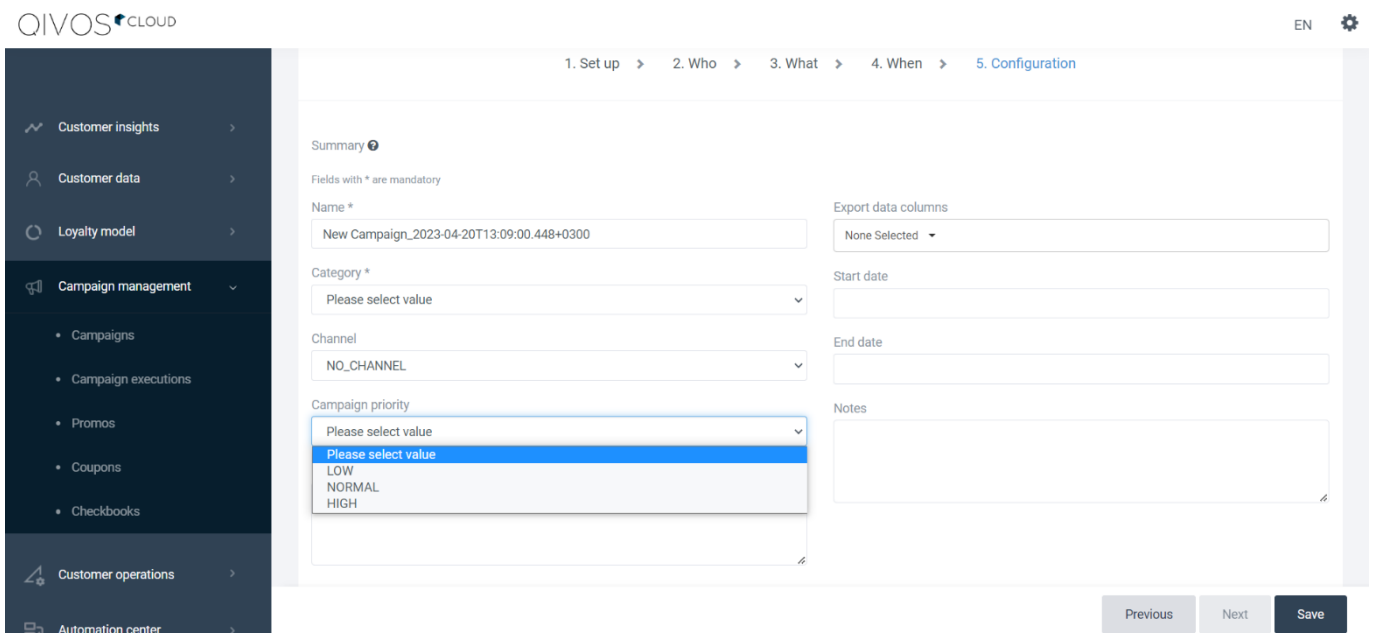


Figure 2.5.2: Campaign Prioritization

## 3. Examples of Campaigns

### 3.1. Birthday Campaign

**Case:**

Members who have their birthdate today will receive an email. Members who have already received the campaign once this year will be excluded (for safety purposes).

**Steps:**

- i. Users should create a campaign and select the target group, loyalty member. Then they define the country and schema they desire.
- ii. In the “Who” tab, users press the “Add New filter” button and select the **Birthday** filter. By default, it will check for members/customers that have their birthdays today.
- iii. They add another filter, the **Valid Email**.
- iv. They add **Consents: Email** filter.
- v. They add the **Have Already received this campaign** filter and check the “this year” checkbox.
- vi. Then, they press the “Advanced panel” button and the “Add new group” button”. Here, users select the **Birthday** filter, the **Valid Email** filter and the **Consents** filter. All of these filters need to have the **AND** operator between them so that the members who have their birthday today, have a valid email and can receive an Email based on Consents will be selected. Then, they add the **NOT IN** operator. It has to be mentioned that a group’s last operator defines its relationship with the next group.
- vii. Users have to create a new group and select the **Have already received this campaign** filter. Now the members who have their birthday today, have a valid email, can receive an Email based on Consents but do not have received birthday campaign this year will be selected. For security reasons, the last operator should be empty.

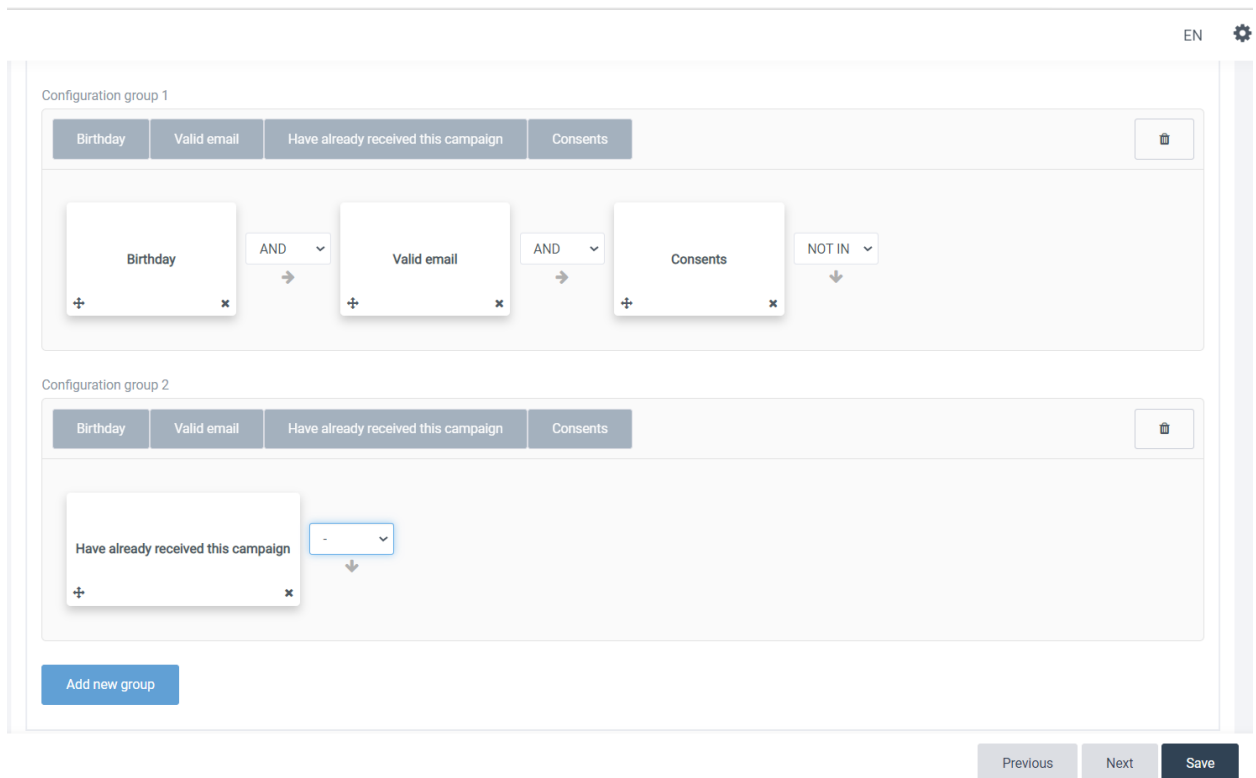


Figure 3.1.1: Advanced filters

- viii. Then, users save the campaign by choosing a name and the category.
- ix. They go to the “What” section and check the *Send Email* option.
- x. They select the proper Email provider and the message language; it is taken from members preferred language field.
- xi. They paste the URL of the html template and then, provide the subject of the email, the sender’s name and the email address.
- xii. Next, users go to the “When” tab and select “On Schedule”.
- xiii. After selecting the time zone, they choose the everyday option and set the hour they want. The schedulers run every 30 minutes.



- xiv. Users go to the Configuration step, add a description and select the export fields; these will be used for the execution lines that will be downloaded after the campaign has run. They can, also, set the start day so that the campaign will start running on that day.
- xv. They save the campaign.
- xvi. They change the status to “Ready to Test.”

### Testing Procedure:

- i. Then, users go to the “Lists” section on the campaign menu, in order to create an empty list whose target will be “Loyalty member”. They should use a unique name, for example, "Test campaign".
- ii. They go to members’ search and find the members they want to add to the test list (There is a button on every members/customer profile named “Add to list”). This list will be used to test the SMS or Email campaign (in this case email).
- iii. There is, also, the option to use a list of members/customers ids as a test list.
- iv. Now, users can go to the What step and press the Test button.

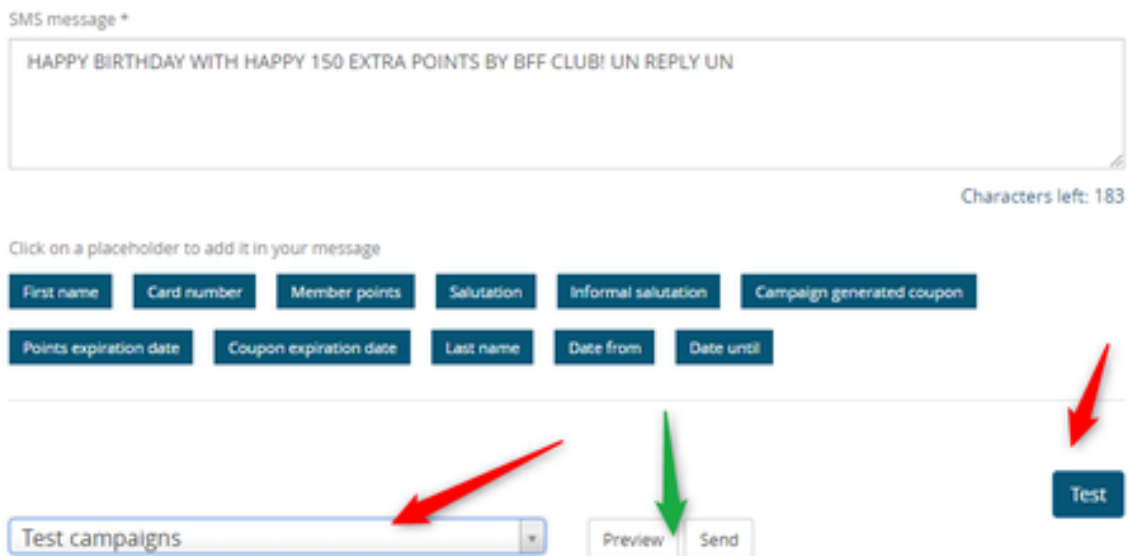


Figure3.1.2: How to test a campaign

- v. They choose the list they have created and press the Preview button, so that they view the members that are part of this list.
- vi. Then, they press the *Send* button, and the email is sent to all the members of that list. Before every test, the campaign is autosaved.

#### Note!

When the message contains placeholders, these are being replaced with the member's information. The test function executes the communication part and **not** any other option that may have been selected in the What step (ex. Give coupon, Give points, etc.). So, when the message has a coupon code or a coupon expiration date, placeholders will be replaced with xxx symbols.

- vii. After the message is tested, users can change the campaign’s status to *Ready to Launch* and press save. Now, the campaign will be executed on the schedule set.
- viii. After the first launch, the campaign recipients can be downloaded.

## 3.2. Coupon Expiration SMS campaign

### Case:

Members whose coupon will expire in 15 days will receive a notification SMS. No member can receive two SMSs in the same day (for safety purposes).



**Steps:**

- i. Users should create a campaign and select the target group, loyalty member. Then they define the country and schema they desire.
- ii. In the “Who” tab, users press the “Add New filter” button and select the **Coupon Expiration** filter. After choosing the coupon-set (the coupon category), they select “days” as the duration type and type “15”. In this way, all members that have a coupon from this coupon-set, which is going to expire in 15 days will be selected.

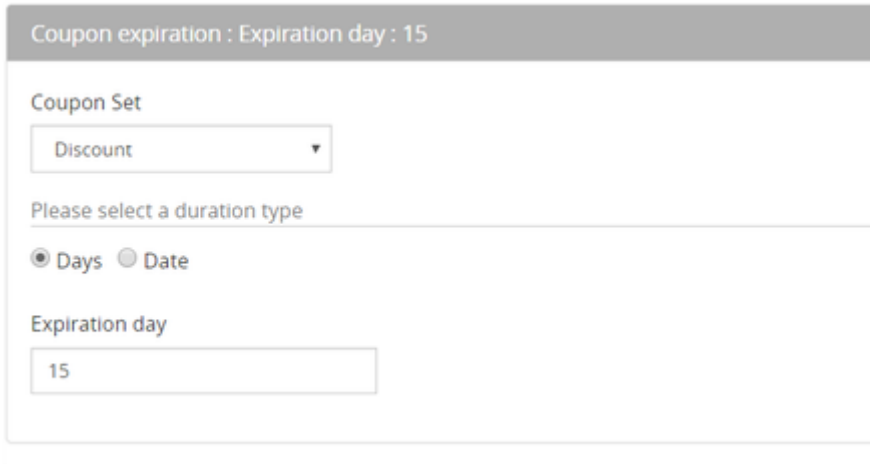


Figure 3.2.1: Configuring the “Coupon expiration” filter

- iii. They add another filter, the **Valid mobile**.
- iv. They add **Consents: SMS** filter.
- v. They add the **Have Already received this campaign** filter and select the “have received the campaign at least once *in the last 1 days*” option, so that every member will receive this campaign only once per day.
- vi. Then, they press the “Advanced panel” button and the “Add new group button”. Here, users select the **Coupon Expiration** filter, the **Valid SMS** filter, and the **Consents** filter. All of these filters need to have the **AND** operator between them so that the members whose coupon is about to expire, have a valid mobile and can receive an SMS based on Consents will be selected. Then, they add the **NOT IN** operator. It has to be mentioned that a group’s last operator defines its relationship with the next group.
- vii. Users have to create a new group and select the **Have already received this campaign** filter. Now the members whose coupon is about to expire, have a valid mobile, can receive an SMS based on Consents but do not have received this campaign today will be selected. For security reasons, the last operator should be empty.

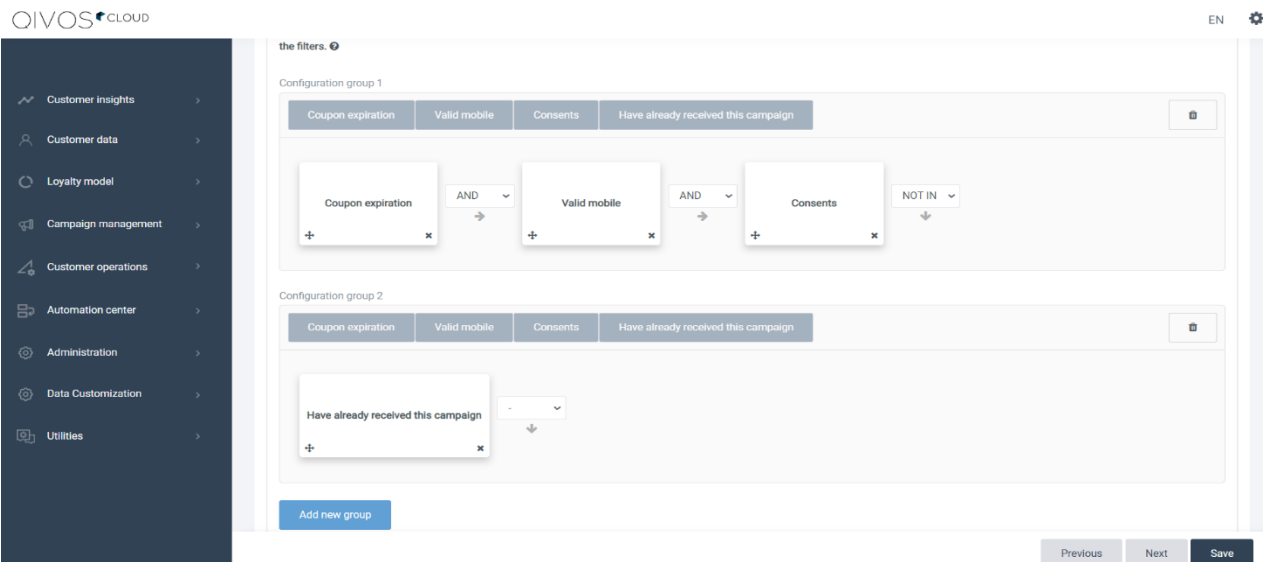


Figure 3.2.2: Advanced panel

- viii. Then, users save the campaign by choosing a name and the category.
- ix. They go to the “What” section and check the *Send SMS* option.
- x. They select the proper SMS provider and the message language; it is taken from members preferred language field.
- ix. They type or paste the message. There is, also the option to use a placeholder (e.g., Dear #firstNameVocative#).
- x. Next, users go to the “When” tab and select “On Schedule”.
- xi. After selecting the time zone, they choose the everyday option and set the hour they want. The schedulers run every 30 minutes.
- xii. Users got to the Configuration step, add a description and select the export fields; those will be used for the execution lines that will be downloaded after the campaign has run. They can, also, set the start day so that the campaign will start running on that day.
- xiii. They save the campaign.
- xiv. Finally, users change the status to Ready to Test and proceed on following the steps for the testing procedure, as described in the first example. Once the campaign is tested, users can change the campaign’s status to *Ready to Launch* and press save. At that point, the campaign will be executed on the schedule set.

### 3.3. Redemption Alert SMS campaign

#### Case:

Members who have 18000 total points or more, which are not going to expire in less than a month, will receive a notification SMS. Each member can receive a redemption Alert SMS, only once in 4 months.

#### Steps:

- i. Users should create a campaign and select the target group, loyalty member. Then they define the country and schema they desire.
- ii. In the “Who” tab, users press the “Add New filter” button and select the **Points** filter. After choosing the option “more than or equals”, they type 18000. In this way, all members that have 18000 total points or more will be selected.
- iii. They add another filter, the **Valid mobile**.
- iv. They add **Consents: SMS** filter.
- v. They add the **Have Already received this campaign** filter and select the “*have received the campaign at least once in the last 4 months*” option, so that every member will receive this campaign only once per 4 months.

- vi. They add the **Pointlog expiration** filter and select the period during which they want the points to expire. In this case, they type “0” in the “Pointlog expiration months from” box and “1” in the Pointlog expiration months until”, so that members whose points expire 0 months before the campaign’s execution, and 1 after will be selected.

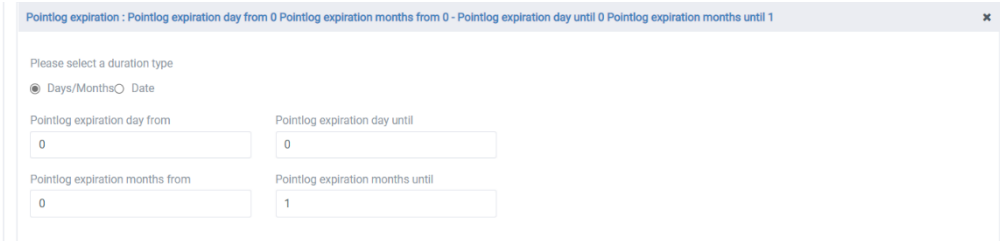


Figure 3.3.1: Configuring the “Pointlog expiration” filter

- vii. Then, they press the “Advanced panel” button and the “Add new group” button”. Here, users select the **Points** filter, the **Valid SMS** filter, and the **Consents** filter. All of these filters need to have the **AND** operator between them so that the members whose points are 18000 or more, have a valid mobile and can receive an SMS based on Consents will be selected. Then, they add the **NOT IN** operator. It has to be mentioned that a group’s last operator defines its relationship with the next group.
- viii. Users have to create a new group and select the **Have already received this campaign** filter and the **Pointlog expiration** filter. These filters need to have the **OR** operator between them. Now the members that either have received this campaign in the last 4 months or their points are about to expire in less than a month will be excluded from the campaign. For security reasons, the last operator should be empty.

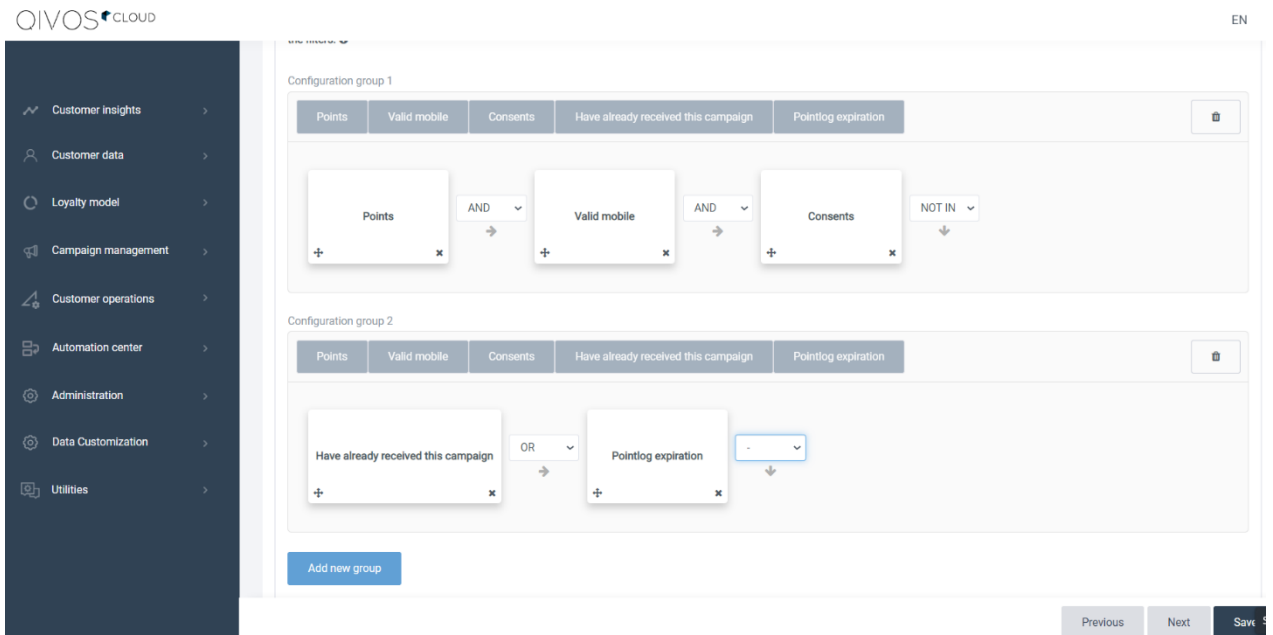


Figure 3.3.2: Advanced panel

- xi. Then, users save the campaign by choosing a name and the category.
- xii. They got to the “What” section and check the *Send SMS* option.
- xiii. They select the proper SMS provider and the message language; it is taken from members preferred language field.
- xv. They type or paste the message. There is, also the option to use a placeholder (e.g., Dear #firstNameVocative#).
- xvi. Next, users go to the “When” tab and selects “On Schedule”.
- xvii. After selecting the time zone, they choose the everyday option and set the hour they want. The schedulers run every 30 minutes.

**Note!** If users want the campaign to be launched on another day of the month (e.g., the 14<sup>th</sup>), they have to make the proper adjustments in the point log expiration filter. (e.g., they have to type “-15” in the

“pointlog expiration day from” box and “15” in the “pointlog expiration day until” box, so that members whose points expire, from 14 days before the campaign’s execution, until 16 days after, will be selected).

- xviii. Users go to the Configuration step, add a description and select the export fields; these will be used for the execution lines that will be downloaded after the campaign has run. They can, also, set the start day so that the campaign will start running on that day.
- xix. They save the campaign.
- xx. Finally, they change the status to Ready to Test and proceed on following the steps for the testing procedure, as described in the first example. Once the campaign is tested, users can change the campaign’s status to *Ready to Launch* and press save. At that point, the campaign will be executed on the schedule set.