# **USER MANUAL**

# **ConnectIn Processes**

(Version: 1.0)

# **Co l ectin**





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# Contents

1.	Setup		3
1	.1.	Configure API	3
1	.2.	Legal Entity	4
1	.3.	Master Synchronization	5
1	.4.	SMS Configuration	5
2.	Custo	mer	6
2	.1.	Customer (Synced from the ERP)	6
2	.2.	Segment	7
2	.3.	Transactions (Synced from the ERP)	8
3.	Chanr	nels	8
3	.1.	Email Templates	8
3	.2.	SMS Templates	10
4.	Engag	ement 1	1
4	.1.	Customer Journey 1	1

# 1. Setup

#### **1.1.Configure API**

[N] connectin	=				KRJ V	⊕ EN mayladev∖admi
<ul> <li>Dashboard</li> <li>Customer</li> <li>Channels</li> </ul>	API List					+ New API
Engagement	ACTIONS	NAME ~		DESCRIPTION		
🌼 Setup	Actions -	Get Customers		Get Customers		
Configure API	View Edit	Get Items		Get Items		
Coupon Configuration	Delete Execute	Get Payments		Get Payments		
🏋 Items	Actions -	Get Staff	l≱	Get Staff		
Master Synchronization Payment Method	Actions -	Get Store		Get Store		
sms Configuration	¢ Actions -	Get Transactions		Get Transactions		
Les Staff	Show 10 v entries Showing 1 to 6 of 6 entri	es				s 1 Next
<ul> <li>✔ Administration</li> <li>■ File</li> </ul>	~					

The master data is designed to sync from the ERP and there are APIs developed for,

- a. Customers only Retail and Loyal customers will be synced.
- b. Retail transactions retail store transaction table and subtables will be synced.
- c. Items Released products of the selected legal entity will be synced.
- d. Payments Payment methods will be synced
- e. Staff store user details will be synced
- f. Store Retail store master data will be synced
- To create a new API, click the **+New API** option and fill in the required information.
- The API will execute based on the schedule we configure.
- We can **View**, **Edit**, **Delete** and **Execute** the API by clicking on the **Action** button against the respective API

## 1.2. Legal Entity

🔊 connectin	=				KRJ V
Dashboard					
🚢 Customer	~	Organization Units			+ New Organization Unit
Schannels	~				
📢 Engagement	$\sim$	ACTIONS	LEGAL ENTITY 🗸	DISPLAY NAME	
🌻 Setup	~	Actions -	KRJ	Karji perfume LLC	
Configure API Country Coupon Configuration Currency	n				
F Items			b.		
<ul> <li>Master Synchronizati</li> <li>Payment Method</li> <li>Sms Configuration</li> <li>Staff</li> </ul>	on	Show 10 🗸 entries Showing	1 to 1 of 1 entries		Previous 1 Next
<ul> <li>➡ Store</li> <li> <i>I</i> Administration     </li> <li>■ File     </li> </ul>	~				

The same legal entity configured in the ERP can be configured in ConnectIn by clicking the **+New Organization** button. The data is filtered to the configured legal entity like the ERP.

New Organization Unit	×
Display Name	
Contoso Retail L <u>[</u> C	
Legal Entity	
USRT	
Country	
United States of America (the)	~
Currency	
USD	
	Cancel Save

[ℕ] connectin	Ŧ						KRJ ~ @ EN mayladevla
Dashboard	k	Master Synch Scl	odules				
Lustomer	×	Master Synch Sci	ledules				+ Configure Synch
<ul> <li>← Channels</li> <li>← Engagement</li> </ul>	ž	ACTIONS	JOB NAME	INTERVAL	REPEAT COUNT	LAST EXECUTED	NEXT EXECUTION
Setup	~	Actions -	Transaction-JOB	5	-1	7/1/2024 3:56:45 PM +00:00	7/1/2024 4:01:45 PM +00:00
Configure API		Actions *	Customer-JOB	5	-1	7/2/2024 12:42:31 PM +00:00	7/2/2024 12:47:31 PM +00:00
Country		Actions -	Item-JOB	5	-1	7/2/2024 12:41:40 PM +00:00	7/2/2024 12:46:40 PM +00:00
<ul> <li>Coupon Configurati</li> <li>Currency</li> </ul>	ion	Actions -	PaymentMethod-JOB	5	-1	7/2/2024 12:41:36 PM +00:00	7/2/2024 12:46:36 PM +00:00
Thems							
🗒 Legal Entity		Actions *	Staff-JOB	5	-1	7/2/2024 12:44:05 PM +00:00	7/2/2024 12:49:05 PM +00:00
Master Synchroniza	ation	🌣 Actions 👻	Store-JOB	5	-1	7/2/2024 12:42:33 PM +00:00	7/2/2024 12:47:33 PM +00:00
📰 Payment Method							
Sms Configuration							

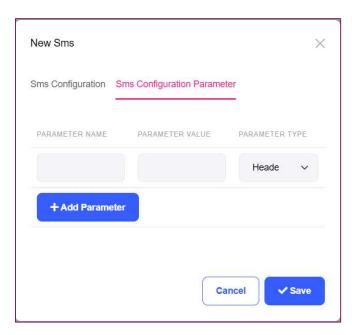
#### **1.3. Master Synchronization**

- As mentioned in point **1.1** Master data for ConnectIn is synced from the ERP.
- From the Master synchronization section, we can define the type of master data and the recurrence of the synchronization.

#### **1.4.SMS Configuration**

The SMS portal API must be configured in the SMS configuration section.

(N) connectin					KRJ 🗸 🌐 EN mayladevladm
UN CONNECCIN		New Sms	$\times$		
Dashboard					
🚢 Customer	Sms Configuration	Sms Configuration Sms Configuration Parameter			+ New Sms Configuration
S Channels					
📢 Engagement	ACTIONS SMS PI	Name *		CATION BODY TEMPLATE	SMSBODYTEMPLATE
🌼 Setup					
Configure API					
Country		Url *			
Soupon Configuration					
\$ Currency		Authentication Type			
) Items		APIKEY	~		
📕 Legal Entity					
Master Synchronization		Api Key Location			
📰 Payment Method	Show 10 🗸 entries	Header	~		Previous Next
Sms Configuration					
💄 Staff 🗃 Store		Authentication Url			
Administration					
File		Authentication Content Type			
File		Json	~		
		Authentication Body Template			
					v



# 2. Customer

### 2.1. Customer (Synced from the ERP)

- The customer section is a view/inquiry form to view the synced customers.
- From the same form, we can configure the synchronization by clicking + **Configure Sync**

Sonnectin	F				KRJ	EN mayladev\admin
Dashboard						
💄 Customer	~	Customer			+ Configu	re Synch + New
😬 Customer						
🕒 Segment					Search	
🛞 Customer Coupon		ACTIONS FIRST NAME - MIDDLE N.	AME - LAST NAME - NATIONALITY	CITY ADDRESS MOBILE NUMBER	EMAIL EMAIL VERIFIED CU	STOMER EXTERNAL I
	-	Edit		0506693191	KJ	-25489
<ul> <li>Channels</li> <li>Engagement</li> </ul>	~	Edit		0504122258	KJ	-32699
<ul> <li>Setup</li> <li>Administration</li> </ul>	×	Edit	ß	0506655772	KJ	-57330
E File		Edit		0509872229	KJ	-45019
		Edit		0559470322	KJ	-38619
		Edit		05025007094	KJ	-30754
		Edit		0529933314	KJ	-21927
		Edit		0504703902	KJ	-10000
		Edit		0501195111	KJ	-10001
				0550965061	12 I	10002

# 2.2.Segment

The Segment section is where we can define and group the customers into meaningful segments based on the campaigns we want to execute.

🕅 connectin	=					KRJ	← ● EN mayladev\admin
🖚 Dashboard 👆							
Lustomer	~	Segment					+ New Segment
🏰 Customer							
쓵 Segment		ACTIONS	NAME ~	DESCRIPTION -	INTER	VAL SCHEDULER A	DDED
Customer Coupon		Actions -	500	Transaction payment amount >= 500	1	true	
<b>₽</b> Transactions							
Schannels	$\sim$						
📢 Engagement	$\sim$						
🕸 Setup	$\sim$						
差 Administration	$\sim$						
🖿 File							
		Show 10 V entries	Showing 1 to 1 of 1 e	ntries			Previous 1 Next

Segment ×	Segment
Segment Segment Query	Segment Query
Name 🕞	AND OR + Add rule • Add group
Above or equal 500	Email Is Verified
Description	equal Verified Not Verified
Transaction amount Above or equal 500	Transaction GrossAmount
Interval In Hours	greater or equal V
1	500
✓ Is Active	Reset Get Rules
	Reset Get Rules
Cancel Save	Cancel Save

#### **2.3. Transactions (Synced from the ERP)**

- The transaction section is a view/inquiry form to view the synced customer.
- From the same form, we can configure the synchronization by clicking + **Configure Transaction Sync**

(N) connectin	F						KRJ ∨ ⊕EN mayladev\adm
Dashboard		Transfer Datalla					
	^	Transaction Details					+ Configure Transaction Synch
📽 Customer 🔇 🔇 Segment						:	Search
Scustomer Coupon		ACTIONS	TRANSACTION ID $$	RECEIPT NUMBER	GROSS AMOUNT	NET AMOUNT	DISCOUNT AMOUNT
≓ Transactions		Actions *	KJAAF1-KJAAF101-1		0	0	0
<b>6</b> Channels	$\sim$						
F Engagement	~	Actions *	KJAAF1-KJAAF101-10		0	0	0
🔅 Setup 🎤 Administration	×	Actions *	KJAAF1-KJAAF101-100		0	0	0
File		Actions -	KJAAF1-KJAAF101-101	L3	0	0	0
		Actions *	KJAAF1-KJAAF101-102		0	0	0
		Actions *	KJAAF1-KJAAF101-103		0	0	0
		Actions -	KJAAF1-KJAAF101-104		0	0	0
		Actions *	KJAAF1-KJAAF101-105		0	0	0
		Actions *	KJAAF1-KJAAF101-107		0	0	0
			KIAAE1 KIAAE101 108		0	0	0

# 3. Channels

#### 3.1. Email Templates

We can define multiple Email Templates for different mail campaigns, from the Email Templates section.

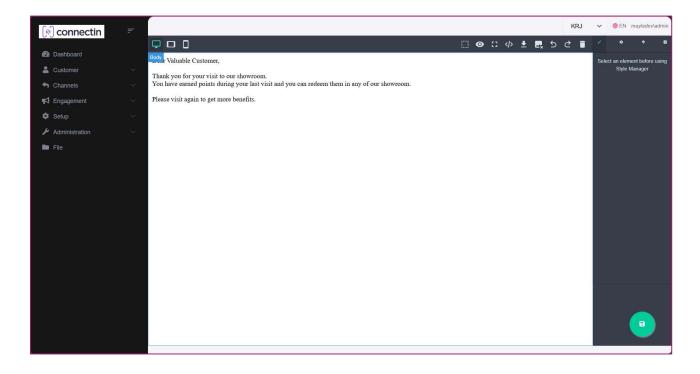
(N) connectin				KRJ ∨ ⊕EN mayladev∖admin
🔁 Dashboard	Email Template			
Customer	Email template			+ New Template
🐱 Email	ACTIONS	NAME $\sim$	DESCRIPTION	
Q1 Sms	Actions -	Gold Tier campaign	Gold Tier Customer Campaign	
📢 Engagement	Edit			
🌣 Setup	Design	Welcome Message	Welcome Message for loyalty customer	
🖋 Administration	Delete			
🖿 File				
	Show 10 v entries	Showing 1 to 2 of 2 entries		Previous 1 Next

By clicking on + **New Template** we can define an email template.

Edit Template	×
Name	
Gold Tier campaign	
Description I Gold Tier Customer Campaign	
Is Active	
	Cancel Save

After saving the template,

- Click on the **Action** button, a drop-down will appear.
- Click on the **Design** menu and the below design window will appear.



## 3.2. SMS Templates

We can define multiple SMS Templates for different SMS campaigns, from the SMS Templates section.

(N) connectin	F					KRJ V @ EN mayladev/admin
Dashboard						
Lustomer	$\sim$	Sms Templates				+ New Template
Schannels	~					
🖂 Email		ACTIONS	NAME 🛩	DESCRIPTION	TEMPLATE	
<b>Q</b> Sms		🌣 Actions -	Summer Sales	10% Summer Sale campaign	Karji Summer SALE - Get 20% off on se	elect items and get free samples. DND7726
📢 Engagement	$\sim$	13				
🗢 Setup	$\sim$					
🗲 Administration	$\sim$					
🖿 File						
		Show 10 🗸 entries	Showing 1 to 1 of 1 entrie	15		Previous 1 Next

Edit Template	$\times$
Name	
Summer Sales	
Description 10% Summer Sale campaign	
Template	
Karji Summer SALE - Get 20% off on select items and get free samples. DND7726	1.
✓ Is Active	
Cancel ✓ Sa	ve

# 4. Engagement

## 4.1. Customer Journey

We can define the campaigns from the customer journey section.

Connectin	Ŧ						KRJ	✓ ⊕ EN mayladev\adm
<ul> <li>Dashboard</li> <li>Customer</li> <li>Channels</li> </ul>	~	Journey						+ New Journey
Engagement	~	ACTIONS	NAME ~	JOURNEY TYPE	SEGMENTNAME	FREQUENCY TYPE	FREQUENCY NUMBER	FREQUENCY NUMBER T
A Customer Journey		Actions -	Gold Tier Campaign	Segment	Above or equal 500	One time for any newly added customer	1	Day
<ul> <li>Setup</li> <li>Administration</li> </ul>	~	Design	Tier Promotion	Segment	Above or equal 500	One time for any newly added customer	1	Day
🖿 File		Actions *	Test	Segment	Above or equal 500	One time for any newly added customer	1	Day
		Actions *	UAE national day	Segment	Nationality based	One time with static audience	1	Day
		Actions *	Welcome Message	Event		One time with static audience	0	Day
		Show 10 V e	ntries Showing 1 to 5	of 5 entries				Previous 1 Next

Click on the + **New Journey** and define the campaigns from the below pop-up window.

New Journey	×
Name	
Journey Type	
_ Event O Sègment Segment Id	
Above or equal 500	~
<ul> <li>OneTimeWithStaticAudience</li> <li>OneTimeForAnyNewlyAddedCusto</li> <li>RecurringJourney</li> <li>Frequency Number</li> </ul>	mer
0	
Frequency Number Type	
Day	~
Start Date	
02/07/2024 15:01:56	×
	Cancel Save

After saving the campaign, click on **Action** and select the **Design** menu to open the below window to define the campaign and **publish**.

