

# USER MANUAL

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## ConnectIn Processes

(Version: 1.0)

Co[]ectin



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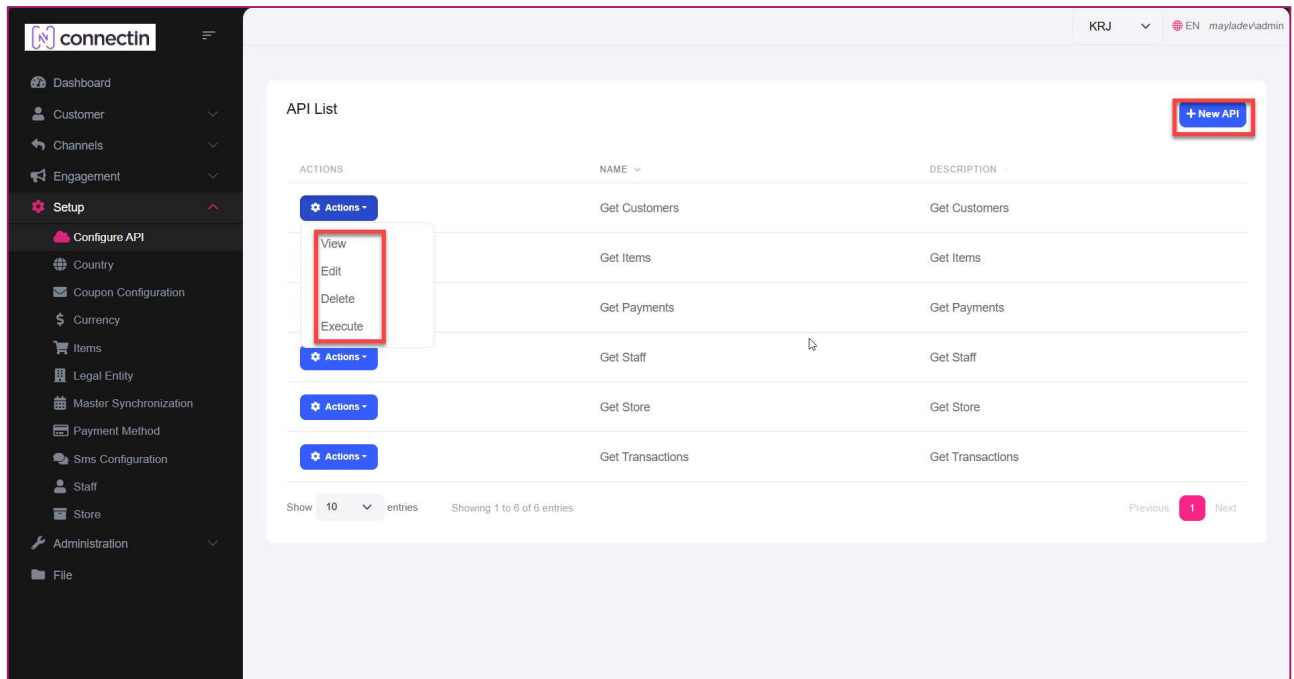
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# 1. Setup

## 1.1. Configure API

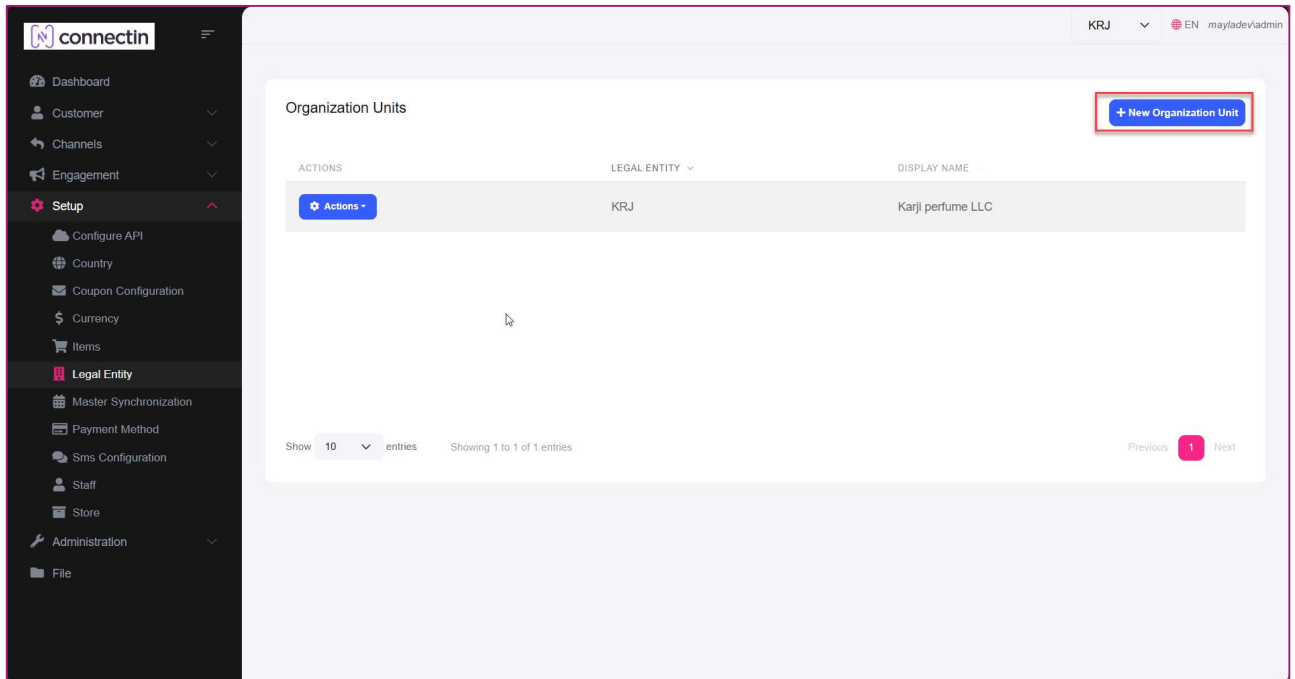


The master data is designed to sync from the ERP and there are APIs developed for,

- Customers – only Retail and Loyal customers will be synced.
- Retail transactions – retail store transaction table and subtables will be synced.
- Items – Released products of the selected legal entity will be synced.
- Payments – Payment methods will be synced
- Staff – store user details will be synced
- 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



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 LLC

Legal Entity

USRT

Country

United States of America (the)

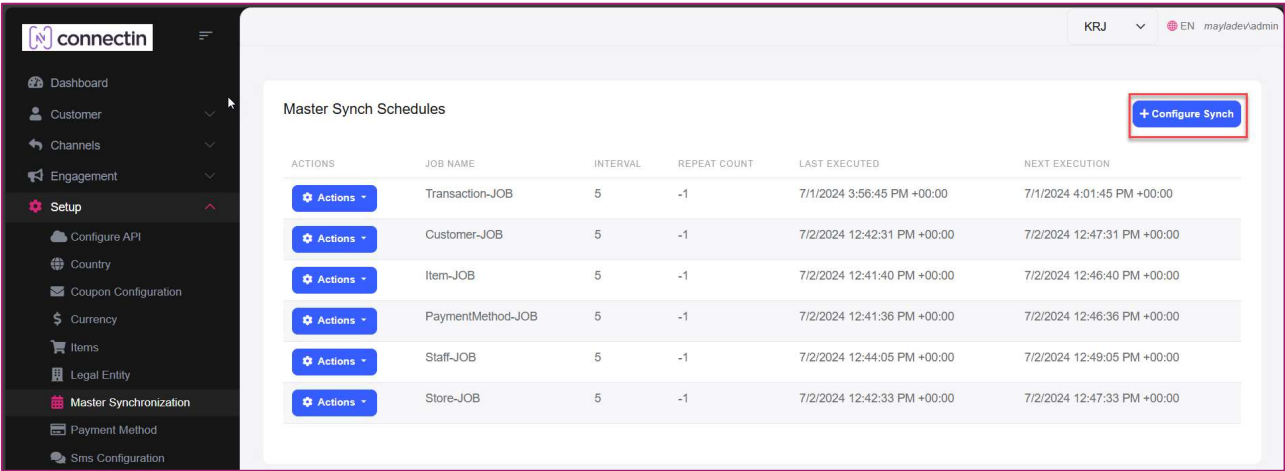
Currency

USD

Cancel

Save

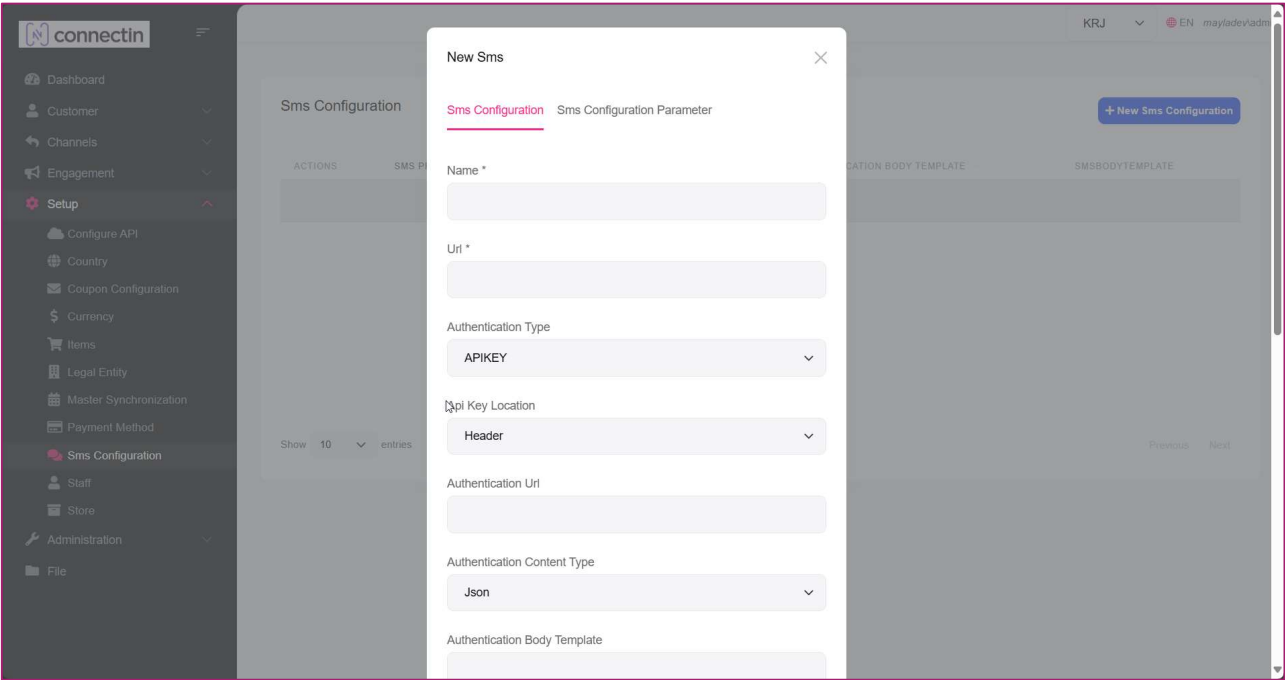
### 1.3.Master Synchronization



- 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.



New Sms

Sms Configuration

Sms Configuration Parameter

PARAMETER NAME

PARAMETER VALUE

PARAMETER TYPE

Heade

+ Add Parameter

Cancel

Save

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**

connectin

Dashboard

Customer

Customer

Segment

Customer Coupon

Transactions

Channels

Engagement

Setup

Administration

File

Customer

+ Configure Sync

+ New

Search

ACTIONS

FIRST NAME

MIDDLE NAME

LAST NAME

NATIONALITY

CITY

ADDRESS

MOBILE NUMBER

EMAIL

EMAIL VERIFIED

CUSTOMER EXTERNAL I

Edit

0506693191

KJ-25489

Edit

0504122258

KJ-32699

Edit

0506655772

KJ-57330

Edit

0509872229

KJ-45019

Edit

0559470322

KJ-38619

Edit

05025007094

KJ-30754

Edit

0529933314

KJ-21927

Edit

0504703902

KJ-10000

Edit

0501195111

KJ-10001

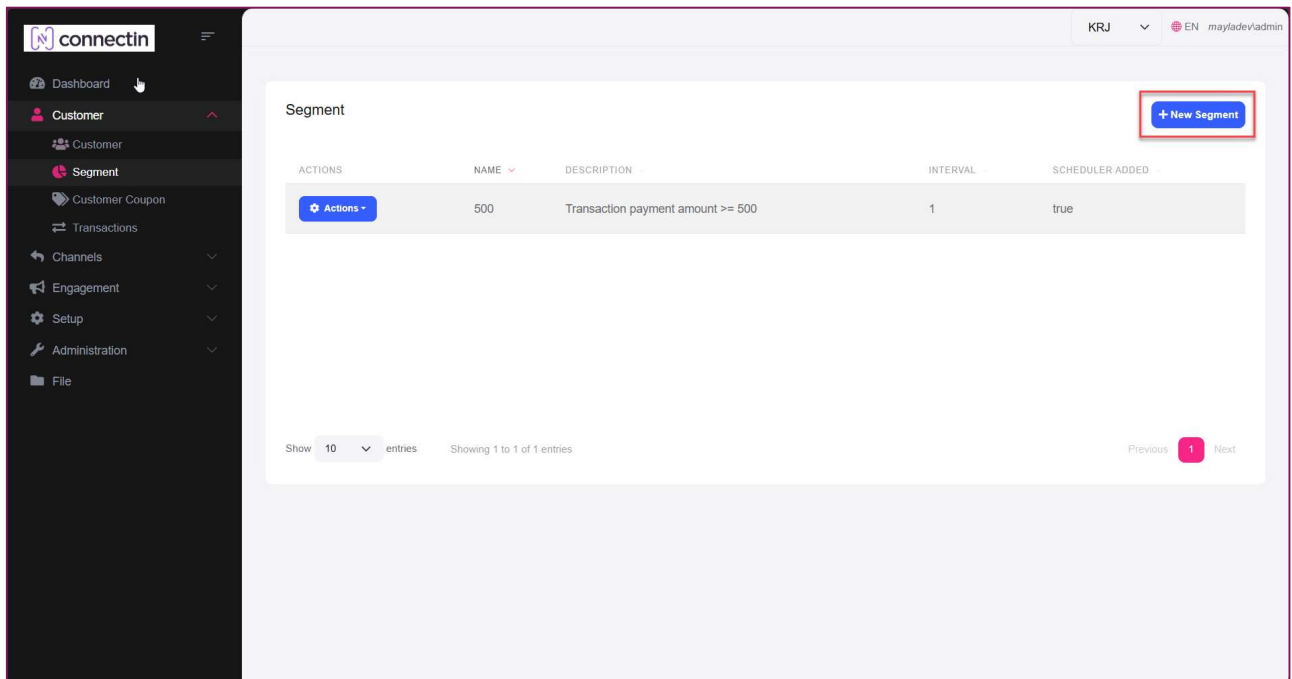
Edit

0550855084

KJ-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.

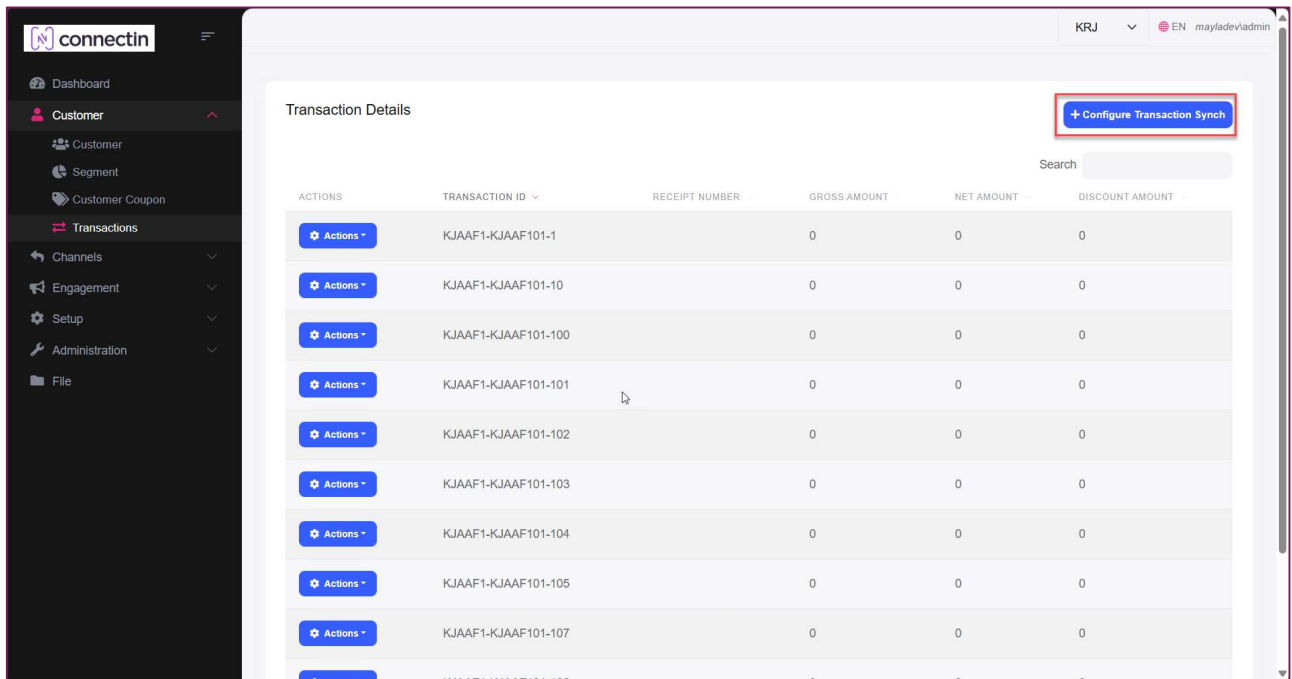


The screenshot shows the 'Segment' form. It has two tabs: 'Segment' (selected) and 'Segment Query'. The form fields are: Name (Above or equal 500), Description (Transaction amount Above or equal 500), Interval In Hours (1), and Is Active (checked). At the bottom, there are 'Cancel' and 'Save' buttons.

The screenshot shows the 'Segment Query' form. It has two tabs: 'Segment' and 'Segment Query' (selected). The form contains a query builder with 'AND' and 'OR' operators. The first rule is 'Email Is Verified' with the operator 'equal' and the value 'Verified'. The second rule is 'Transaction GrossAmount' with the operator 'greater or equal' and the value '500'. At the bottom, there are 'Reset', 'Get Rules', 'Cancel', and 'Save' buttons.

## 2.3. Transactions (Synced from the ERP)

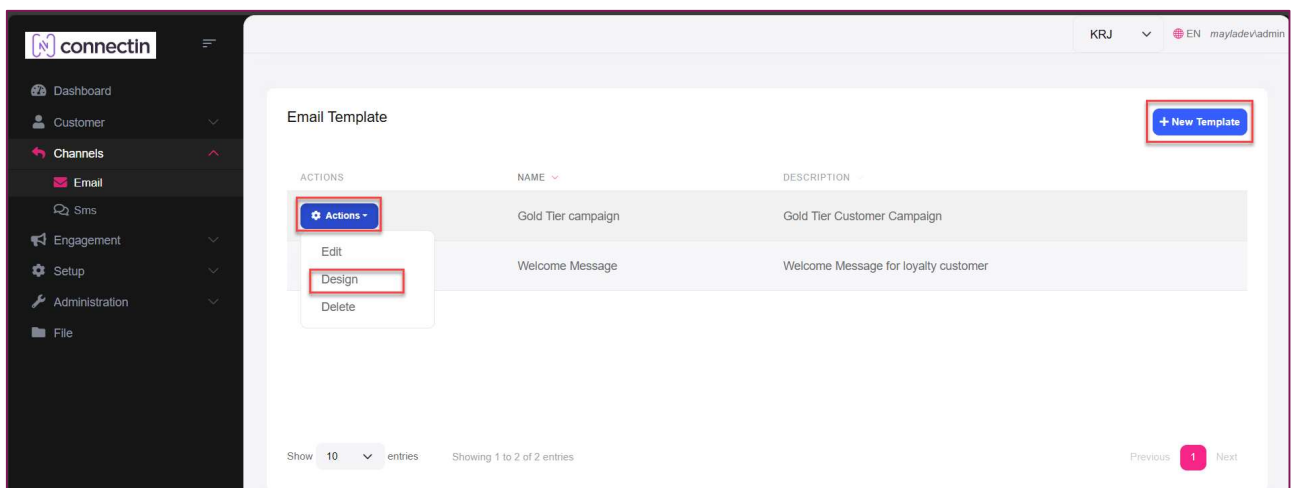
- The transaction section is a view/inquiry form to view the synced customer.
- From the same form, we can configure the synchronization by clicking **+ Configure Transaction Sync**



## 3. Channels

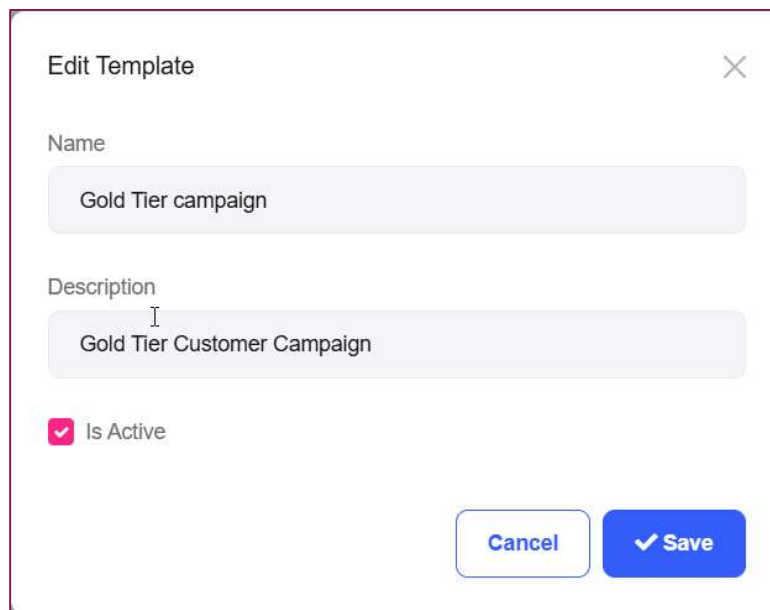
### 3.1. Email Templates

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





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

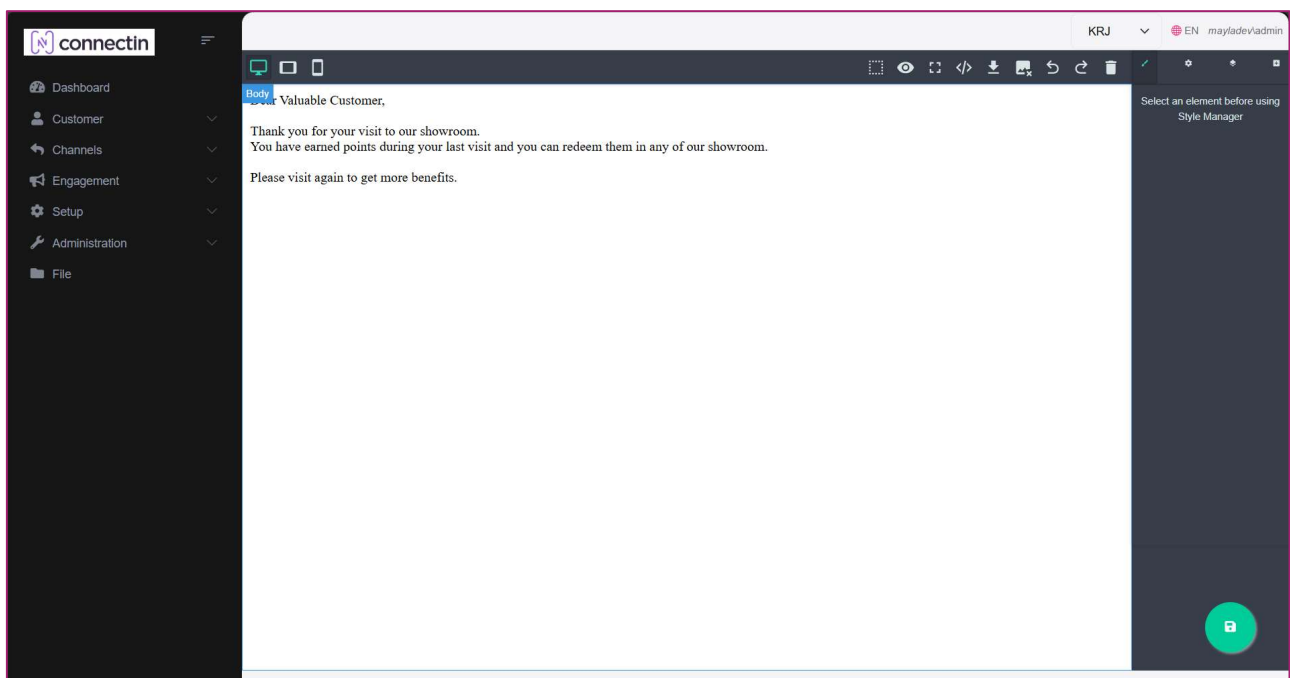


The 'Edit Template' dialog box contains the following fields and controls:

- Name:** A text input field containing 'Gold Tier campaign'.
- Description:** A text input field containing 'Gold Tier Customer Campaign'.
- Is Active:** A checkbox that is checked, with the label 'Is Active'.
- Buttons:** 'Cancel' and 'Save' buttons at the bottom right.

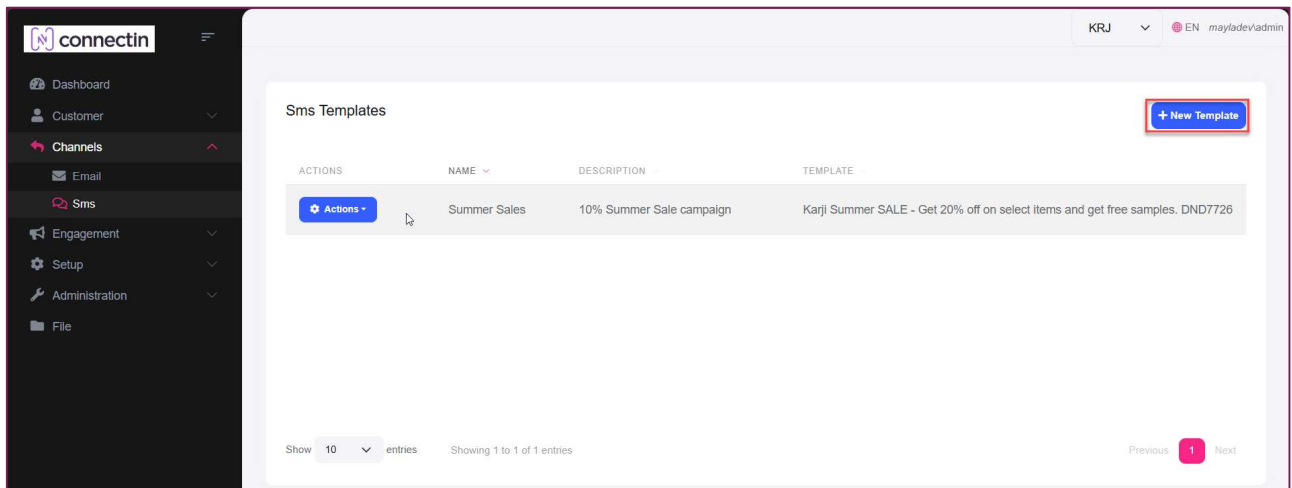
After saving the template,

- 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.



### Edit Template

Name

Summer Sales

Description

10% Summer Sale campaign

Template

Karji Summer SALE - Get 20% off on select items and get free samples. DND7726

☒ Is Active

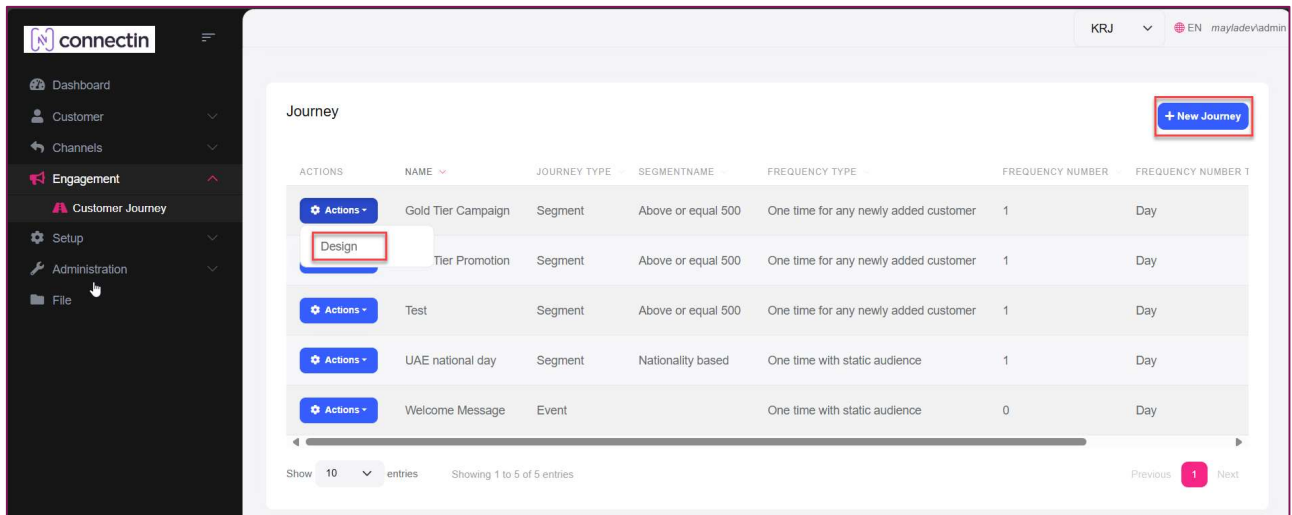
Cancel

Save

## 4. Engagement

### 4.1. Customer Journey

We can define the campaigns from the customer journey section.



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

New Journey

Name

Journey Type

☐ Event

☒ Segment

Segment Id

Above or equal 500

☒ OneTimeWithStaticAudience

☐ OneTimeForAnyNewlyAddedCustomer

☐ RecurringJourney

Frequency Number

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**.

