USER MANUAL

ConnectIn Processes

(Version: 1.0)

Co[N]ectin

THE SOLUTION Consulting

Contents

1. Setup

1.1. Configure API

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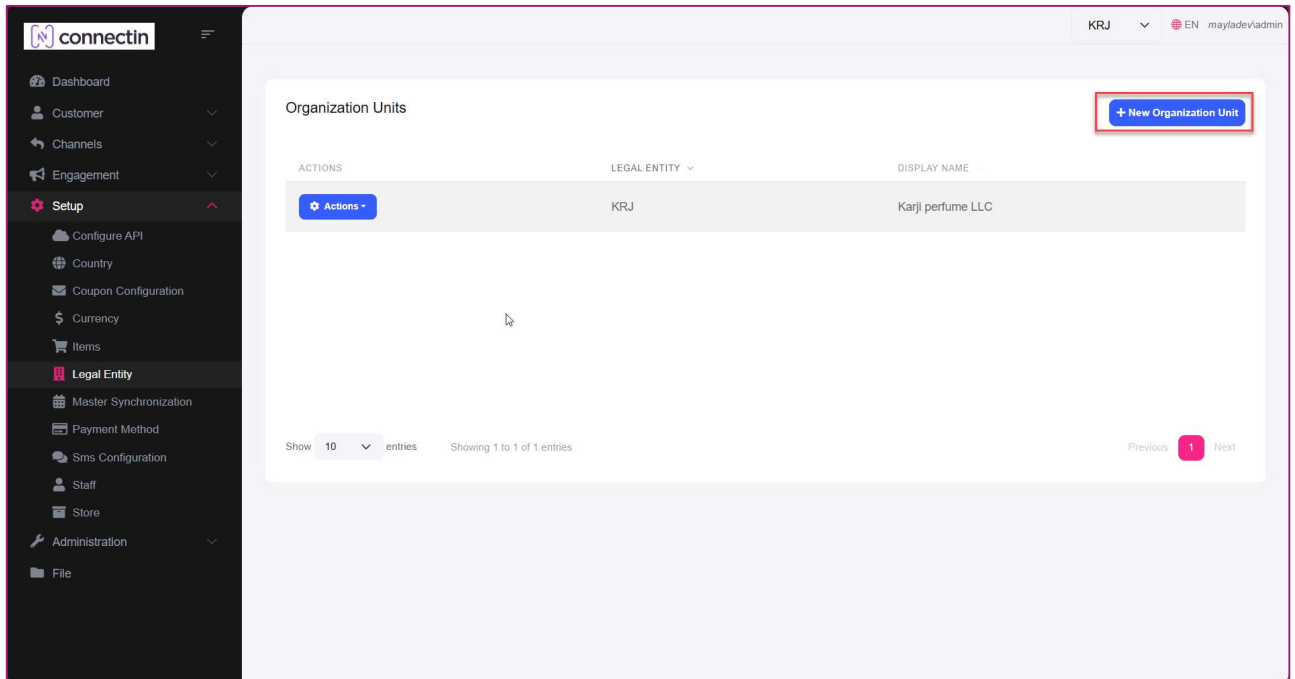
The same legal entity configured in the ERP can be configured in ConnectIn by clicking the **+New Organization** button. The data is filtered to the configured legal entity like the ERP.
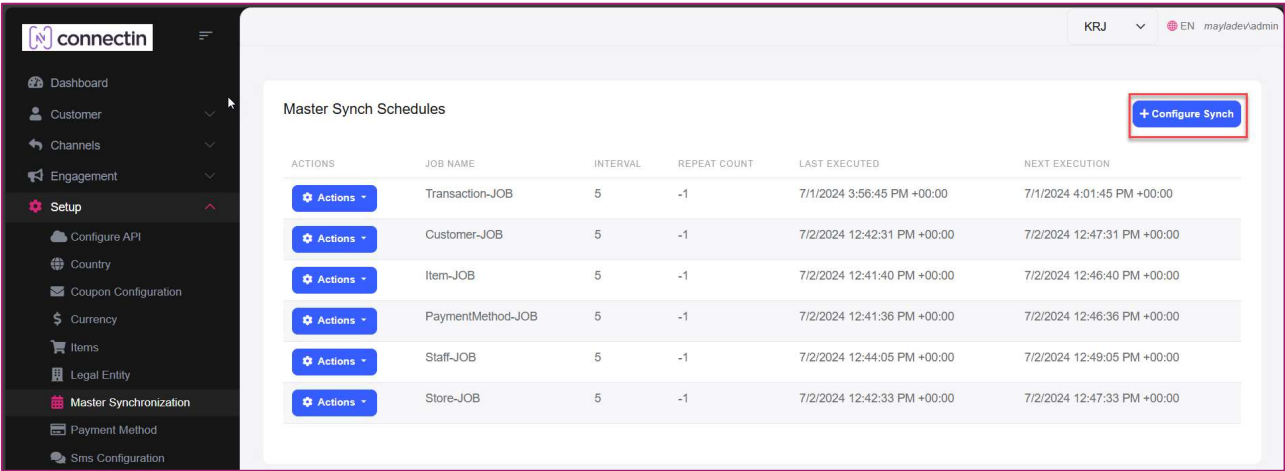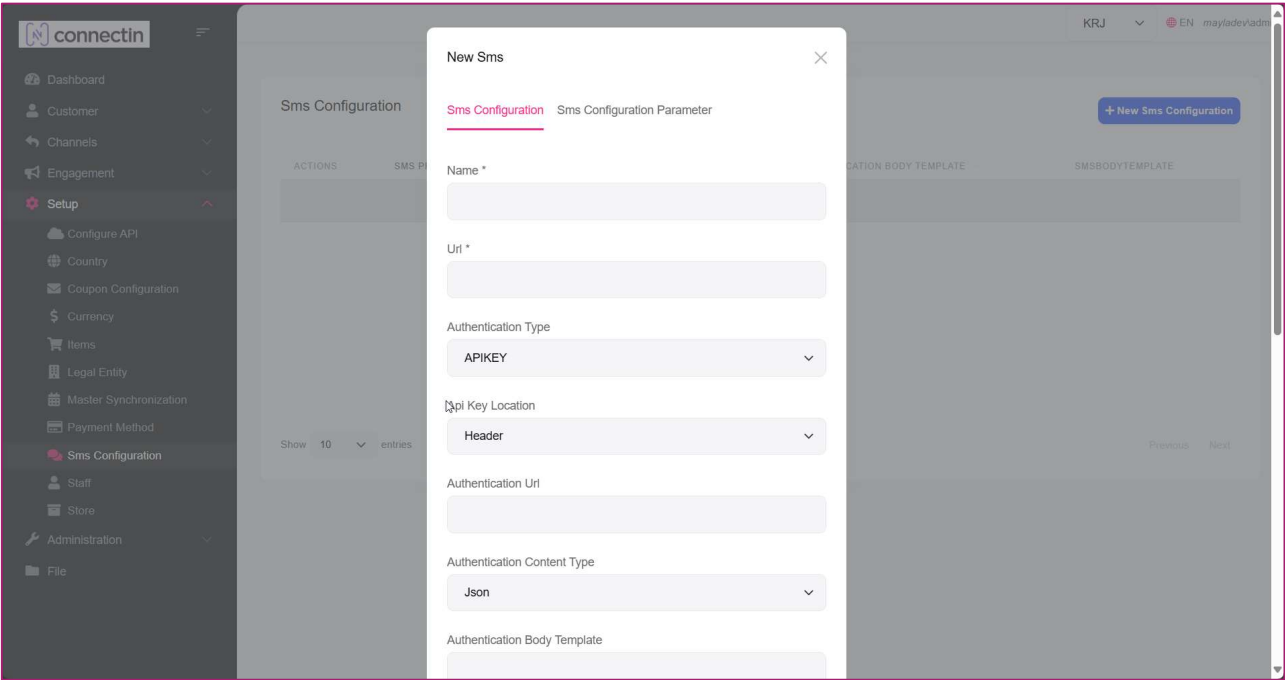
1.3. Master Synchronization

- 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.

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**
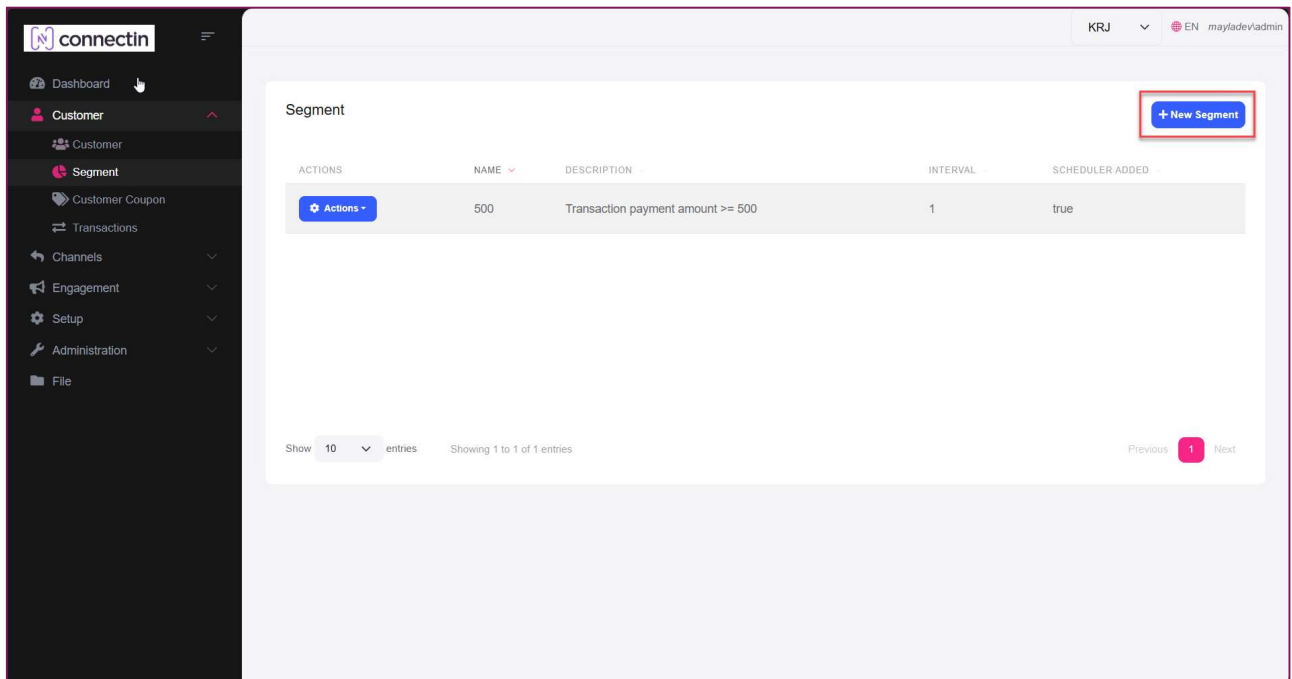
2.2. Segment

The Segment section is where we can define and group the customers into meaningful segments based on the campaigns we want to execute.
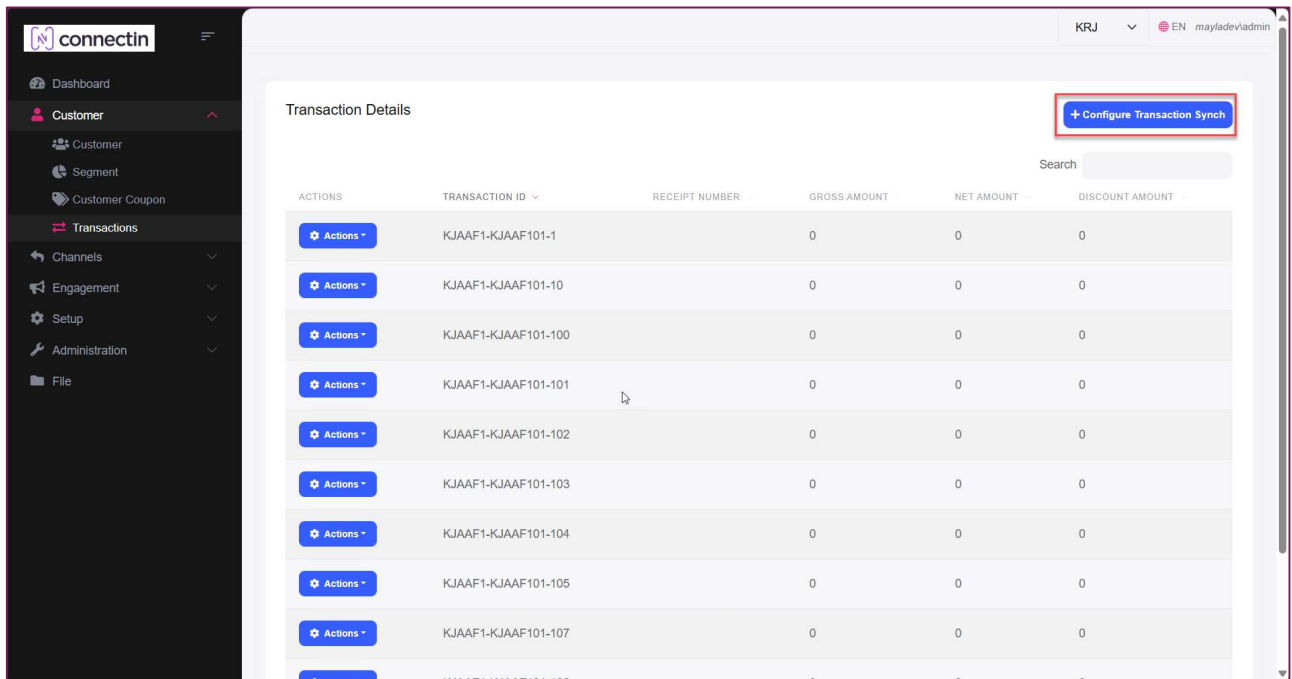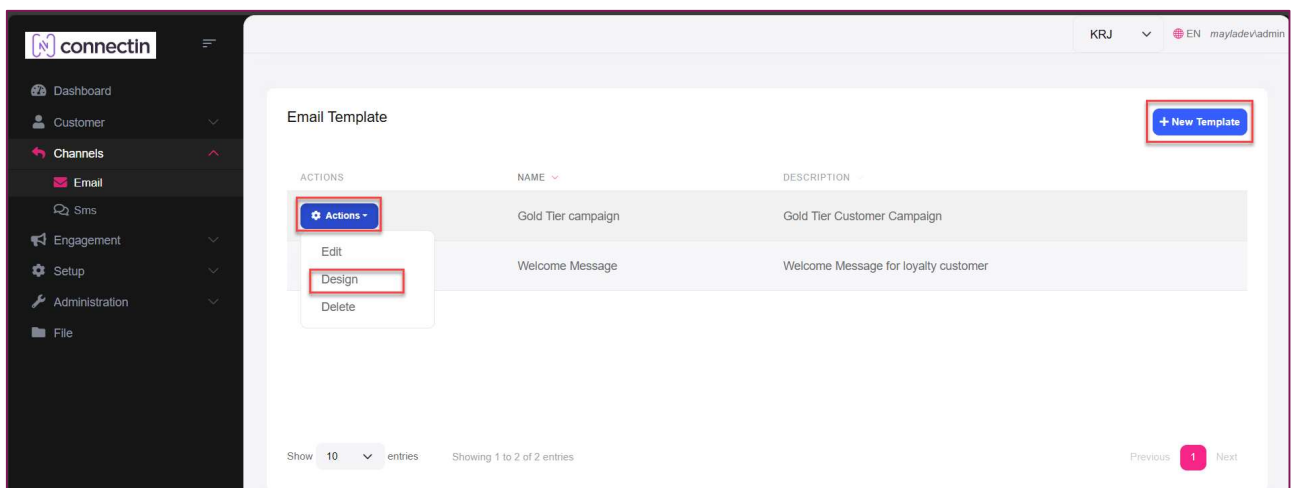
2.3. Transactions (Synced from the ERP)

- 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**
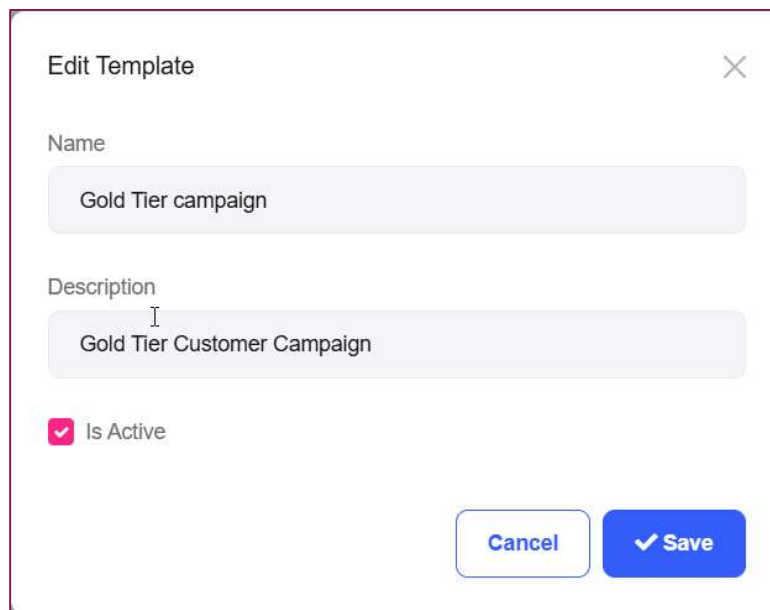

3.   Channels

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.
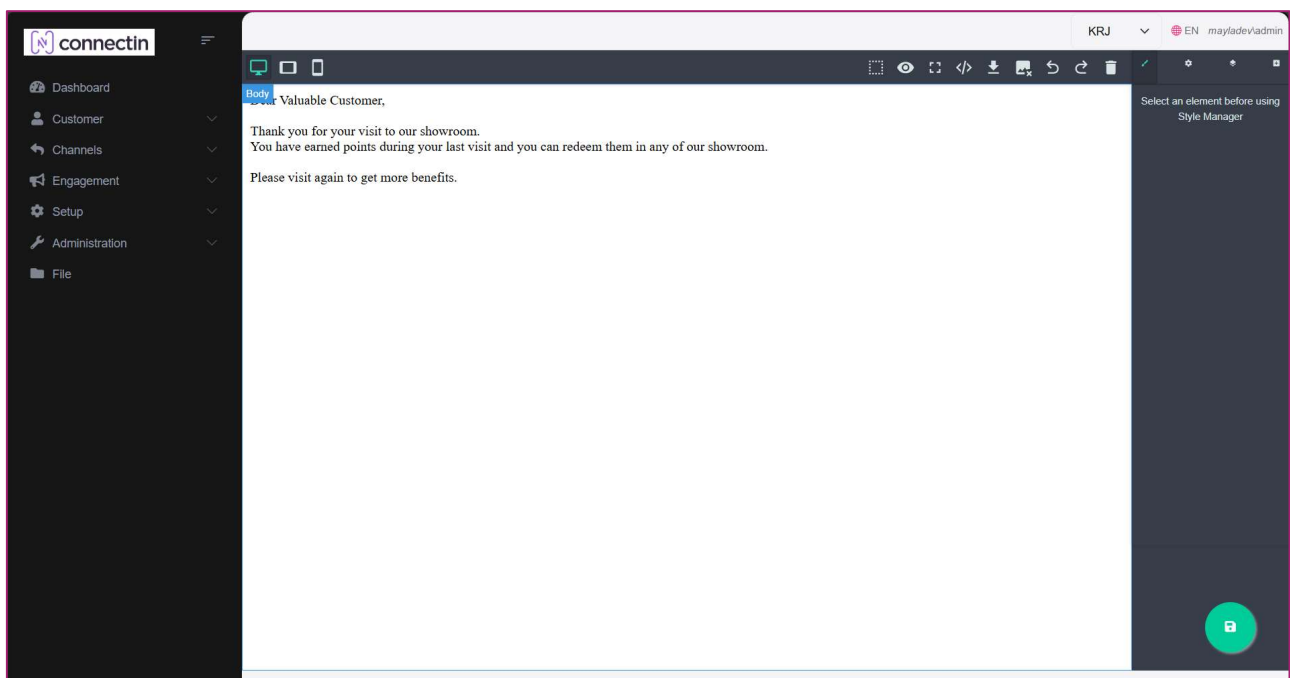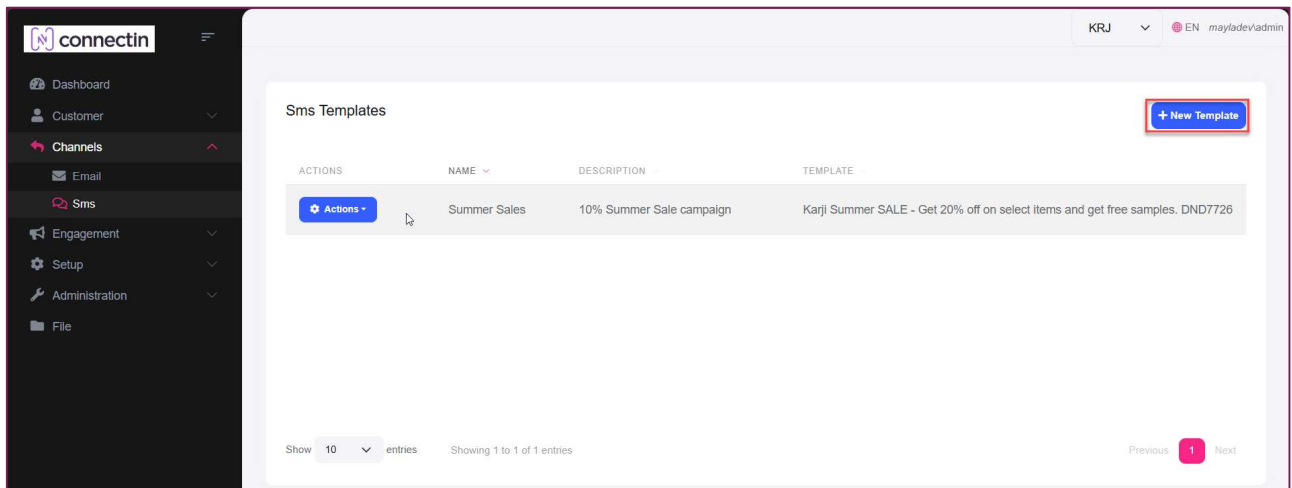

After saving the template,

- 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

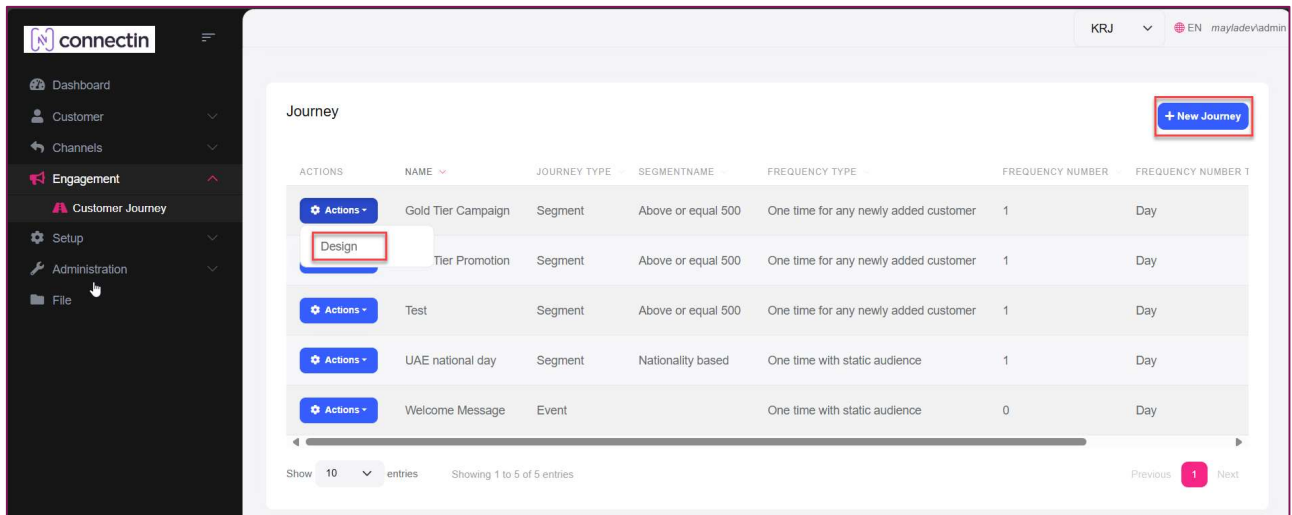We can define multiple SMS Templates for different SMS campaigns, from the SMS Templates section.

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.

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