USER MANUAL

ConnectIn Processes

(Version: 1.0)

Co l ectin





The Solution Consulting FZ CO Office No. 161 and 162, Techno Hub 1, Silicon Oasis, Dubai-UAE, PO Box-342139

S www.thesolutionglobal.com

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1. Setup

1.1.Configure API

[N] connectin	=				KRJ V	⊕ EN mayladev∖admi
 Dashboard Customer Channels 	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
 ✔ Administration ■ File 	~					

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.		
 Master Synchronizati Payment Method Sms Configuration Staff 	on	Show 10 🗸 entries Showing	1 to 1 of 1 entries		Previous 1 Next
 ➡ Store <i>I</i> Administration ■ File 	~				

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
 ← Channels ← Engagement 	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
 Coupon Configurati Currency 	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							

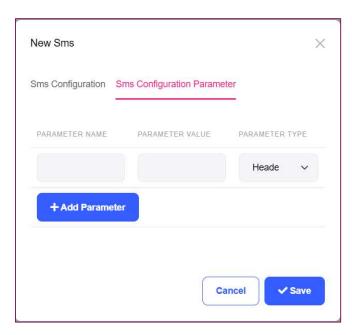
1.3. Master Synchronization

- 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
 Channels Engagement 	~	Edit		0504122258	KJ	-32699
 Setup Administration 	×	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	
₽ 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
6 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.

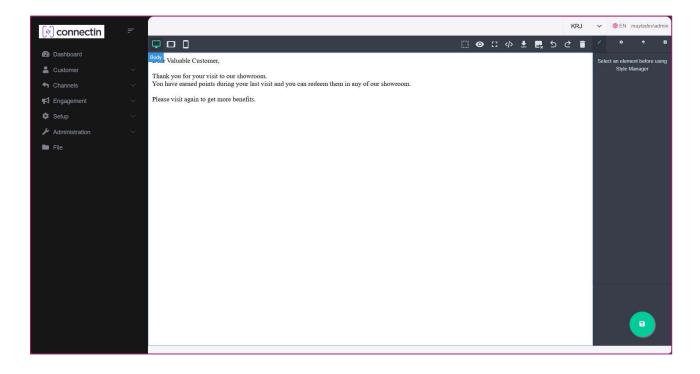
(N) connectin				KRJ ∨ ⊕EN mayladev∖admin
🔁 Dashboard	Email Template			
Customer	Email template			+ New Template
🐱 Email	ACTIONS	NAME \sim	DESCRIPTION	
Q1 Sms	Actions -	Gold Tier campaign	Gold Tier Customer Campaign	
📢 Engagement	Edit			
🌣 Setup	Design	Welcome Message	Welcome Message for loyalty customer	
🖋 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	
Q 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
 Dashboard Customer Channels 	~	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
 Setup Administration 	~	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	~
 OneTimeWithStaticAudience OneTimeForAnyNewlyAddedCusto RecurringJourney Frequency Number 	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**.

