

## EEE Customer Communications

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## Communication Types

There are three types of communications that can be setup in EEE.

### Loyalty Program Sign up Emails

EEE can send a verification emails to customers when they have joined to one of the configured loyalty customer categories. To enable this, configure an Email template for new customers.

Utilities→Configuration →Configuration Settings →Customer tab

- Communication settings
  - Email template for new customer

### Email address verification

Email address verification requires the following configuration.

Utilities→Configuration →Configuration Settings →Customer tab

- Communication settings
  - Verify customer email address

The verification link can be included in the following templates

- Email template for new customer verification – when a customer enters a new email address they will be sent this email.
- Email template to send after new customer email verification has been actioned by customer
- Email template for customer email address change
- Forgotten password email template

For more details on the verification system, see EEE Email Verification Process from [http://theoracle.magentaretail.com.au/EEE\\_WebService](http://theoracle.magentaretail.com.au/EEE_WebService)

## Marketing Communications

Marketing communications allow users to send customers marketing emails from EEE.

### Loyalty Communications

Loyalty type communications are sent for the following templates configured under

Utilities→Configuration →Configuration Settings →Loyalty and Gift Card

- Loyalty Rewards Program
  - Communication Settings

Issue Notification - Loyalty rewards are issued

Warning Notification - Loyalty rewards are about to expire

Teaser Notification - When a customer is almost at the required points balance to receive a reward

## EEE Communication Configuration

The communications settings for both loyalty and marketing communications are  
Utilities→Configuration →Configuration Settings →Customer tab

- Communication Settings

| Configuration Item                                              | Description                                                                                                                                                                                                                                                                             |
|-----------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Maximum number of times to retry sending a failed communication | Number of times to retry sending any communications                                                                                                                                                                                                                                     |
| Use Email Notification                                          | Should customers be notified by email                                                                                                                                                                                                                                                   |
| Customer communication email from address                       | The “From” email address when a email is sent to a customer. If you want a name before the email address use the format <ul style="list-style-type: none"><li>- Name &lt;emailaddress&gt;</li><li>- E.g. Magenta Retail&lt;test@magentaretail.com.au&gt;</li></ul>                      |
| Email Gateway Type                                              | Currently EEE supports emailing via an SMTP server or the Amazon SES service ( <a href="http://aws.amazon.com/ses/">http://aws.amazon.com/ses/</a> )                                                                                                                                    |
| POP3 Server settings for Non-delivery notification checking     | EEE can monitor a POP3 email account and use any non-delivery notifications to mark a customers account as “Dead Email” if their email address could not be contacted                                                                                                                   |
| Use SMS Notification                                            | Should customers be notified by SMS – Note that this currently requires a clickatell ( <a href="http://www.clickatell.com/">http://www.clickatell.com/</a> ) sms gateway account with a SOAP API gateway set up                                                                         |
| SMS GateWay URL                                                 | URL to SMS Gateway web service                                                                                                                                                                                                                                                          |
| SMS GateWay Username                                            | Username for SMS Gateway access                                                                                                                                                                                                                                                         |
| SMS GateWay Password                                            | Password for SMS Gateway access                                                                                                                                                                                                                                                         |
| SMS GateWay Apild                                               | API Id for SMS Gateway access                                                                                                                                                                                                                                                           |
| Enable Email Tracking Statistics                                | See <a href="http://theoracle.magentaretail.com.au/images/EEEWebServiceDocumentation/EmailClickandOpenlinktracking.pdf">http://theoracle.magentaretail.com.au/images/EEEWebServiceDocumentation/EmailClickandOpenlinktracking.pdf</a> for more information on Email Tracking Statistics |

## Setting Up a Customer Communication

A customer communication record is setup under

Customer Management→ Loyalty and Marketing → Customer Communications

Refer to the Loyalty and marketing document which can be found under EEE Manuals and then Customer Management & Marketing Menu at <http://www.magentaretail.com.au/documents.php>

for details on creating a new communications

**NOTE: If this is an email template and it will be used for Loyalty or Signup email processes, ensure that Ongoing Communication is selected.**

## Email and SMS Templates

In order for EEE customer communications to work, communication templates must be set up. For email notifications this is an html formatted file that is uploaded into EEE when the communication is set up.

For SMS notifications the template should be entered directly into the field available.

### Dynamic Tags

The communication templates support a number of tags that will be replaced with appropriate values based on the type of communication. These tags are

| Tag                         | Notes                  |
|-----------------------------|------------------------|
| <i>Customer Record tags</i> |                        |
| {CustomerCode}              |                        |
| {CustomerCategoryCode}      |                        |
| {LoyaltyNumber}             | primary loyalty number |
| {BranchCode}                |                        |
| {Name}                      | the customer full name |
| {Surname}                   |                        |
| {Firstname}                 |                        |
| {Salutation}                |                        |
| {ChargeAccount}             | has charge account     |
| {AccountStatus}             | charge account status  |
| {Address1}                  |                        |
| {Address2}                  |                        |
| {Address3}                  |                        |
| {Address4}                  |                        |
| {Postcode}                  |                        |
| {State}                     |                        |
| {SuburbWithState}           | E.g. Brisbane, QLD     |
| {Country}                   |                        |
| {Delivery1}                 |                        |
| {Delivery2}                 |                        |
| {Delivery3}                 |                        |
| {Delivery4}                 |                        |
| {DeliveryPostcode}          |                        |
| {DeliveryState}             |                        |
| {Email}                     |                        |
| {Email2}                    |                        |
| {Phone}                     |                        |
| {Phone1}                    |                        |
| {Fax}                       |                        |
| {Mobile}                    |                        |
| {DOB}                       |                        |
| {Demographic1}              |                        |
| {Demographic2}              |                        |

| Tag                               | Notes                                                                                                                |
|-----------------------------------|----------------------------------------------------------------------------------------------------------------------|
| {Demographic3}                    |                                                                                                                      |
| {Demographic4}                    |                                                                                                                      |
| {Demographic5}                    |                                                                                                                      |
| {Demographic6}                    |                                                                                                                      |
| {Demographic7}                    |                                                                                                                      |
| {Demographic8}                    |                                                                                                                      |
| {Demographic9}                    |                                                                                                                      |
| {Demographic10}                   |                                                                                                                      |
| {Demographic11}                   |                                                                                                                      |
| {Demographic12}                   |                                                                                                                      |
| {Demographic13}                   |                                                                                                                      |
| {Demographic14}                   |                                                                                                                      |
| {Demographic15}                   |                                                                                                                      |
| {Demographic16}                   |                                                                                                                      |
| {Demographic17}                   |                                                                                                                      |
| {Demographic18}                   |                                                                                                                      |
| {Demographic19}                   |                                                                                                                      |
| {Demographic20}                   |                                                                                                                      |
| {CreditLimit}                     | A charge account customers credit limit                                                                              |
| {TransactionLimit}                | A charge account customers transaction limit                                                                         |
| {DateCustomerCreated}             |                                                                                                                      |
| {Contact}                         |                                                                                                                      |
| {Preferences}                     |                                                                                                                      |
| {RebatePercentage}                |                                                                                                                      |
| {SubsidiaryCustomerCategoryCode}  |                                                                                                                      |
| {MasterCustomerCode}              |                                                                                                                      |
| {ABN}                             |                                                                                                                      |
| {GSTRegistered}                   |                                                                                                                      |
| {RepNumber}                       |                                                                                                                      |
| {FinanceContactName}              |                                                                                                                      |
| {BuyingContactName}               |                                                                                                                      |
| {SalesRepCode}                    |                                                                                                                      |
| {NewCreditLimit}                  | A charge account customers new credit limit                                                                          |
| {NewTransactionLimit}             | A charge account customers new transaction limit                                                                     |
| {Gender}                          |                                                                                                                      |
| {LoyaltyStartDate}                |                                                                                                                      |
| {LoyaltyStatus}                   |                                                                                                                      |
| {CustomerCategory}                |                                                                                                                      |
| {emailverificationguid}           | The unique email verification id used in verification emails                                                         |
| {password}                        | The customers password. This should not be used unless plain text password are being stored in EEE (not recommended) |
| {HouseHold}                       | Supported for backwards compatibility only                                                                           |
| {Occupation}                      | Supported for backwards compatibility only                                                                           |
| {ShoppingFrequency}               | Supported for backwards compatibility only                                                                           |
|                                   |                                                                                                                      |
| <i>Customers Home Branch tags</i> |                                                                                                                      |
| {Branch}                          |                                                                                                                      |
| {BranchAddress1}                  |                                                                                                                      |
| {BranchAddress2}                  |                                                                                                                      |

| Tag                              | Notes                                                                           |
|----------------------------------|---------------------------------------------------------------------------------|
| {BranchAddress3}                 |                                                                                 |
| {BranchState}                    |                                                                                 |
| {BranchPostCode}                 |                                                                                 |
| {BranchPhone}                    |                                                                                 |
| {BranchFax}                      |                                                                                 |
| {BranchEmail}                    |                                                                                 |
| {BranchManager}                  |                                                                                 |
|                                  |                                                                                 |
| <i>Customer Loyalty tags</i>     |                                                                                 |
| {LoyaltyStartDate}               |                                                                                 |
| {CustomerCategory}               |                                                                                 |
| {LoyaltyValueAccumulatedCurrent} | A customers current loyalty points balance                                      |
| {LoyaltyValueIssuedTotal}        | The total reward \$ issued to a customer                                        |
| {LoyaltyValueIssuedLast}         | The last reward \$ issued to a customer                                         |
| {amount}                         | The amount of the loyalty reward being issued or expired                        |
| {expirydate}                     | The expiry date of the customers loyalty rewards                                |
| {loyaltystatement}               | A copy of the customers loyalty statement                                       |
| {lastshoppedon}                  | The date of the customers most recent sale                                      |
| {lastitempurchased}              | The product code and description of the most recent item the customer purchased |

## Template Files

See the Sample Templates.zip for detailed template usage. Basic usage is below:

| HTML – Email Templates                                                                                                                                                                                               |
|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <pre> &lt;html&gt;   &lt;head&gt;     &lt;title&gt;Test Email&lt;/title&gt;   &lt;/head&gt;   &lt;body&gt;     &lt;p&gt;       This is a test for {customercode}     &lt;/p&gt;   &lt;/body&gt; &lt;/html&gt; </pre> |
| Plain Text – SMS Templates                                                                                                                                                                                           |
| <pre> This is a test for {customercode} </pre>                                                                                                                                                                       |