



User Guide

Essential

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Get Started

Congratulations on subscribing to the Echo Loyalty Essential package plan. Now that your plan is finalized, please follow these steps to complete your subscription setup and access your plan's features.

Activate your account

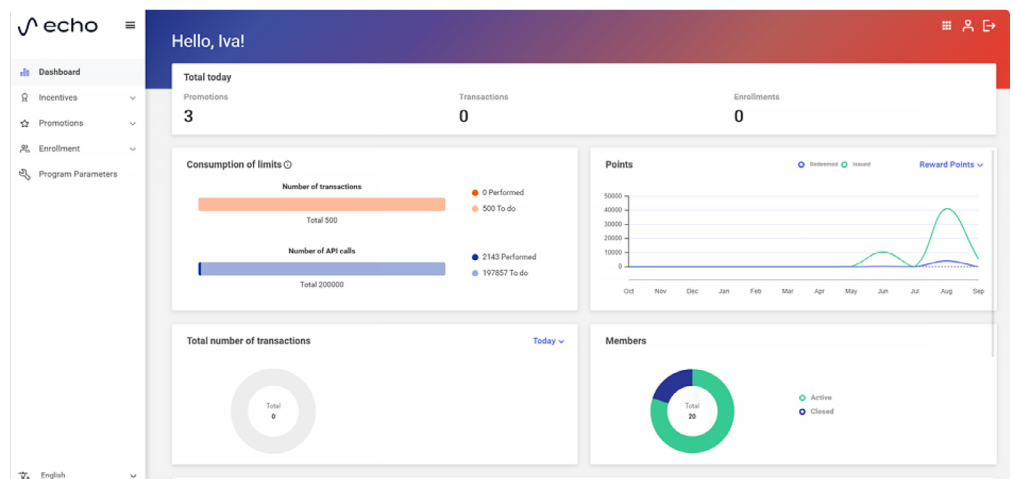
After your purchase, you will receive an email from echo-tm@comarch.com containing instructions for activating your account. This will enable access to both the Marketer Panel and the Customer Care Panel. Please click on the provided link to activate your account.

Reset your password (account activation)

You will be redirected to a Password Reset page. Create your new password and proceed to log in to the Marketer Panel.

Access the Marketer Panel

After you reset your password, you can log in to the Marketer Panel.



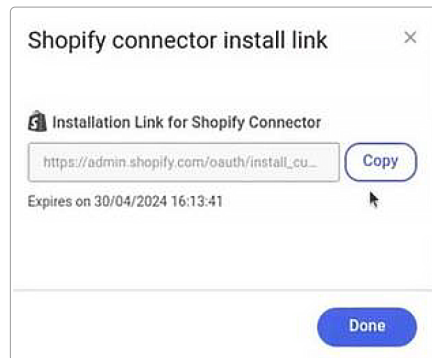
Integrations



Shopify

If you purchased through Shopify, a pop-up containing the installation link for the Shopify connector will appear.

1. Please copy the unique link for your Shopify store into a new browser window.
2. Echo Loyalty will then be activated for your Shopify store.



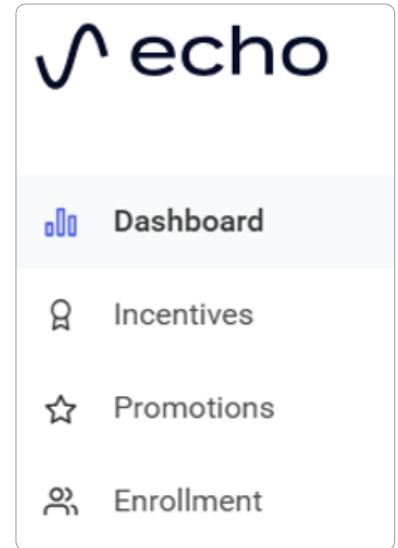
Marketer Panel

Navigation and dashboard

Main menu

Below is a description of the Marketer Panel navigation items.

- Dashboard – the central place to see your loyalty program’s performance.
- Incentives – add your incentives that will be used for future promotions.
- Promotions – to create the best offers for your membership.
- Enrollment – set up how users will join your loyalty program and share select data.
- Program Parameters - add logo/brand image and change time zone.



Dashboard

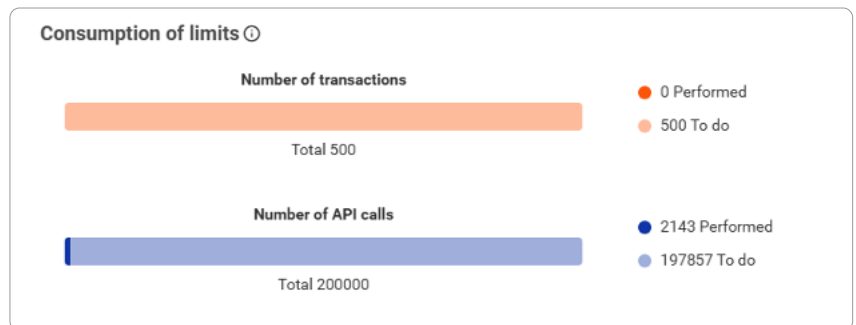
The dashboard provides an overview of your promotions, transactions, enrollment, and more.

Transaction data

- Number of Transactions performed as of **today**.
- Number of Transactions performed in the **current month**.
- Number of Transactions performed in the **previous month**.

Consumption of limits

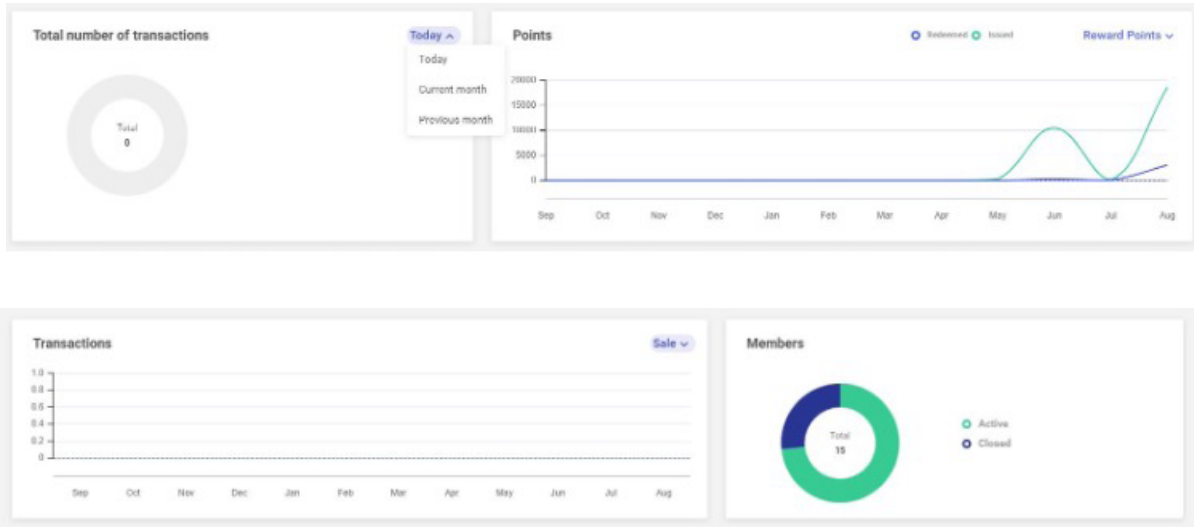
- Number of **sales transactions left** until the limit is reached.
- Number of **API calls left** until the limit is reached.



Points data

Number of points redeemed and issued by month.

- ◆ Tip: You may check the monthly number of transactions by transaction type and the current status of your membership.



Account settings

You can use the account settings to switch between the Marketer Panel and Customer Care Panel, check your user information, and more.

To access your account settings or switch to another panel/portal, use the menu options in the top right hand of the screen.



Use My Account to:

- Check personal user data: first name, last name, and email address
- Change your user password

Use System Version to:

- Check the Echo Loyalty version
- See the installation link of your Shopify Connector

Use Menu to:

- Switch between Marketer Panel and Customer Care Panel
- Switch to Web Portal (if available)

Enrollment

Enrollment options

Members can be enrolled via different channels

1. Your e-commerce shop.
2. Your Web Portal or App.
3. Via Echo Essential Customer Care Panel.

Enrollment through an e-commerce store

Customers may become your program members using enrollment options in your e-commerce store.

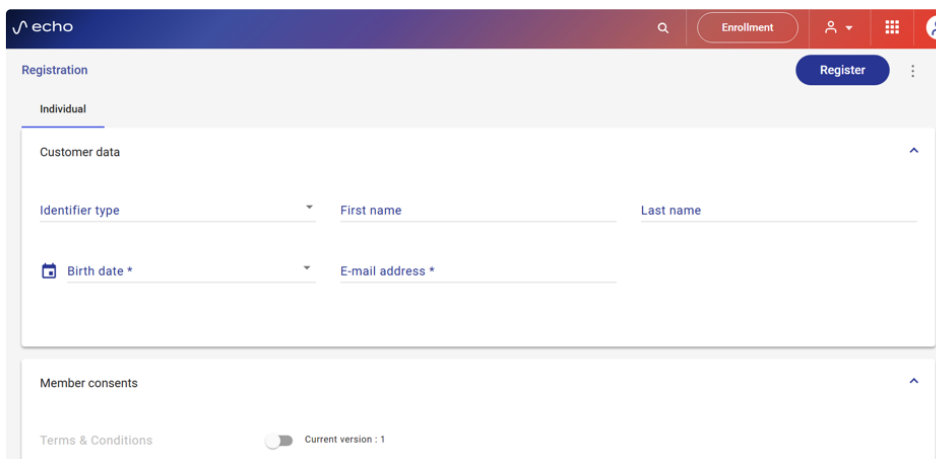
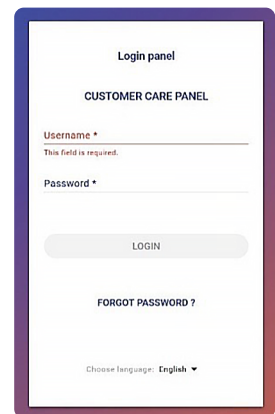
Enrollment through the Web Portal

If your program uses Web Portal or another application, customers will follow the specific steps defined to create an account, filling in the pertinent fields to enroll with your program. This includes the acceptance of member consents configured in the member settings within the Marketer Panel.

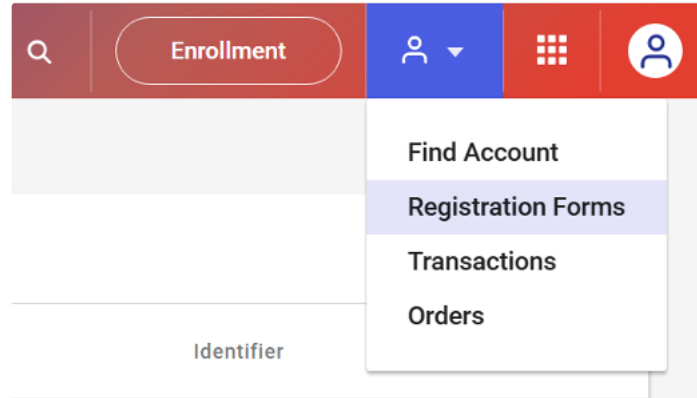
If you would like to learn more about Comarch Web Portal, please get in touch with us by emailing: sales@echoloyalty.com.

Enrollment for Essential users in the Customer Care Panel

1. Log in to the Customer Care Panel. You may use a link provided during the subscription process in your email.
2. Go to the top right corner of the window and click on “Enrollment.”
3. Fill out all mandatory fields marked with an asterisk (*) and accept the terms and conditions. During interactions with a member, confirm acceptance of the terms and conditions and any other consents that are mandatory or optional for the program.
4. Click on the “Register” button to finish registration.



- ◆ To check if the member was correctly added, go to the Registration Forms tab on the top right corner of the member menu.



Member settings

The Member’s Settings section in the Marketer Panel is comprised of three main sections:

- Members Consents
- Password Policy
- Enrollment Restrictions

Member consents

1. To successfully enroll a member, you need to add the required consent information for the member. This will be displayed during the enrollment process, and the member must provide consent for Personal Data Processing, Personal Data Profiling, and the Terms & Conditions.
2. To add the copy/content and activate it, click the “Add consent” button.
3. Change the status to active, fill out the mandatory fields (Name, status, acceptance level, document version, and content), and add consent. You can do it manually, or you can add a PDF file.

Type	Name	Acceptance level	System version	Document version	Status
Personal data processing	Personal data processing	Mandatory	–	–	+Add consent
Personal data profiling	Personal data profiling	Mandatory	–	–	+Add consent
Loyalty program communications	Loyalty program communications	Optional	–	–	● Inactive
Marketing communication	Marketing communications	Optional	–	–	● Inactive
Terms & Conditions	Terms & Conditions	Mandatory	1	s1	● Active
Communications by third party par...	Communications by third party par...	Optional	–	–	● Inactive

- ◆ A specific period means consent is only required during a specific period of time. All other consents are options and refer to members’ communication. Members need to accept it to receive any external communication.

Password policy

Go to the member setting and scroll past the member consent section.

This policy is merely informative, not customizable, and the parameters are the following:

- Min password length: 8
 - At least 1 big letter(s)
 - At least 1 small letter(s)
 - At least 1 number(s)
 - At least 1 special character(s)
- ◆ Note: There is a default minimum and a maximum length limit of characters used for member passwords.

Enrollment restrictions

- Min Age of Customer (Editable): 18
- Min Length of Customer Login: 3
- Max Length of Customer Login: 254

There are limited options in Echo Essential for editing enrollment restrictions. You can do it by:

- Changing member’s age
- Adding blocked email addresses domains
- Adding blocked phone prefixes

Member attributes

Member attributes constitute the enrollment form members will fill out when creating their loyalty accounts. All attributes are visible for the Mobile App/Member Portal, Customer Care Panel, and Shopify. They are marked Optional and Mandatory accordingly.

Essential license: Please note that this is not editable; however, if you want to upgrade to access additional product features, please get in touch with us at sales@echoloyalty.com.

Member attributes		
Name	Value type	Acceptance level
Identifier number	Text	Optional
First Name	Text	Optional
Last Name	Text	Optional
Birth date	Date	Mandatory
Email	Text	Mandatory
Country	Text	Mandatory
Customer status	Text	Mandatory
Terms & Conditions	Text	Mandatory

Loyalty member data

Members will have access to the data they provided here through their front-facing applications. Some of this data will be editable.

Program parameters

The Program Parameters section on the Marketer Panel is comprised of 3 sections:

1. Brand name and logo
2. Parameters
3. Member Language
4. Currency.

- ◆ **Brand name and logo:** Brand name is submitted during subscription processing but it can be edited through the edit field in the Program Parameters. Please add your brand image which will be used in e-mail communication to your clients and in Web Portal (if applicable)

Parameters: points, reward returns, and time zone

The only editable parameter is the time zone. The other parameters are fixed. If you want to edit the time zone, click on “edit.” Setting the correct time zone is crucial because all promotions are based on the time zone you specify. It’s important to set it to the local time.

All other data are set up by default, as shown below.

Points	Reward returns	Time zone
Points accumulation period 0 month(s)	Reward refund period 14 day(s)	Default time zone America/Phoenix
Points expiration period 12 month(s)	Customer data	
Points booking default delay 0 day(s)	The ability to close the member account from the mobile application Disabled	

Default settings Essential users

Member languages

- Default language: English
- There is one language in the Echo Essential set per default.

Member currency

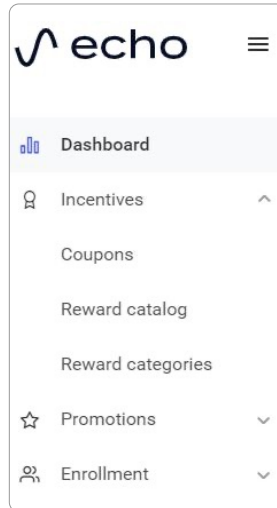
- Default currency: USD \$
- There is one currency in Echo Essential set per default.

If you want to access additional features or upgrade your plan, please get in touch with sales@echoloyalty.com.

Incentives

How to create a coupon

1. Go to the Marketer Panel and select Incentives and the Coupons section.



2. Click on “+Add a new coupon.”



3. Add information about a coupon
 - With an Echo Essential plan, a coupon Code will be auto generated.
 - Choose Distribution mode:
 - Mass Campaign:** to be sent out to all customer base
 - Reward:** for members to buy with points
 - Promotion:** as an incentive for specific behaviors
 - Add a coupon name and an internal description
 - Set up the status: Active or Inactive.
 - Add External name. The external name will be displayed in your shop or member-facing apps if you use API B2C.

Content for Mobile App and Member portal

English

External name*
COUPON_REWARD_\$5

External description

0 / 2000

Coupon images
Only .png, .jpeg files. 500kb max file size. Max 2 images.

Drag & drop here or [Select file](#)

4. Add a coupon image.
 - The coupon image will be represented on the Loyalty Page; click “Select file” and add the PNG or JPEG file.
 - Your image should not exceed 500kB, and you can upload 2 images.
 - Configure Usage of incentive
5. Choose coupon validation period.
 - Define the coupon period.
 - Select Coupon validation period – a period when your members can use the coupon.
 - To use days, weeks, months, or years instead – select a Specific period after coupon issuance and define a number.
 - Use the no time limit option if there is no defined period to use a coupon.

◆ **Tip:** If you used Rewards as a Distribution Mode, the start date should be later than the Reward you need to set up so that a member can see your coupon as a reward.

How to set up an incentive for a coupon

6. Select USD or Percent.
7. Add value.

8. Choose if members will be able to use a coupon only once, several times, or if there is an unlimited option to use it.
9. Select Coupon Provision Channel Preferences: POS or EMAIL.
 - **POS:** To share a message printed on a member receipt - include a marketing text.
 - **Email:** To send a coupon to a member after they fulfill promotion requirements – use email template.
10. Select the standard email template.
 - Email will be sent once coupon conditions are fulfilled by a member.

11. Content of an email has limited personalized elements:

- Store name - pulled from information received during subscription process; store name will be populated in a closing section (“Best regards, your store name Team”)
- Logo - will replace the default logo
- Personalization based on data:
 - Member name – pulled from member information
 - Coupon code – provided during configuration
 - Expiration date – provided during coupon configuration
- Discount – provided during configuration



12. Check the Summary

13. Create a coupon

[Create](#)

◆ Tip: You may edit coupon by changing values, images, values and data; to learn more use Product Reference Book.

Promotions

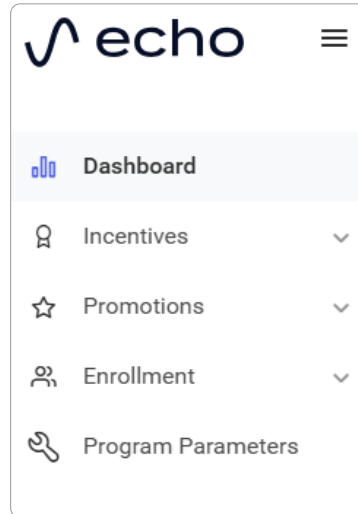
Types of promotions

The following types of promotions are currently available for Essential users.

1. Welcome promotion
2. Birthday promotion
3. Sale / Discount promotion

How to create a welcome promotion

1. Log in to the Marketer Panel, and on the left-hand menu, select “Promotions” followed by “General Promotions.”



2. Select “+Add new promotion” on the top right-hand side.

+Add new promotion

3. Create an internal promotion name that can be used to identify or search for the promotion results later.

◆ **Tip:** You may want to use a short title, uppercase letters, and underscore to make promotions easy to find and report later. For example: **“WELCOME_NEW”**

4. Add an internal description of the promotion

5. Set up Status by choosing **“Active”** or **“Inactive.”**

- If the promotion is still being edited, you may set it up initially as Inactive. You can then change the promotion status to Active when ready to launch.

6. Provide a start date and time

- Make sure it will launch after creating the welcome promotion.

7. Provide an end date.

- **Note:** You may leave the end date blank for ongoing welcome promotions, so the promotion is continuously running.

8. Create an external promotion name (required) and external description (optional) that new loyalty members can see.

- Please note that the external description will be displayed only on member-facing apps if you use API B2C.

- Next, you can modify how your customers will see the promotion by using our drag-and-drop functionality to edit the displayed image for your promotion.



Define the promotion conditions

Next, you can confirm the event type and define the promotion’s conditions.

- Under Event, select “Enrollment.”
- Once you have selected Enrollment, all other promotion conditions (event channel, promotion type, and conditions) will be pre-configured to allow you to seamlessly create your Welcome Promotion for customers who have signed up for your loyalty program.

Reward new loyalty members after they sign-up

- Ensure that the incentive is “On.”
- Next, select “+Add incentive type,” which will prompt the Promotion grants following incentives section to appear.
- Select “Points” or “Coupon” from the drop-down menu.
 - Points:** Reward your new loyalty members with points so they can redeem rewards sooner. Under result change, ensure the value is above 1.
 - Coupons:** Reward your new members with a coupon. To do so, click on “Select coupon,” which will allow you to choose a coupon you have already created in the Marketer Panel.

◆ **Note:** The system shows only coupons configured with the Distribution mode set up as Promotion.

- Additional incentives: With our pre-configured enrollment settings, you can easily offer an additional incentive by selecting “+Add an incentive” again.
- To proceed and create your welcome promotion, click on the “Summary” button on the bottom right-hand side of the screen.
 - You will then be able to view a complete summary of your welcome promotion to ensure everything is created.
 - Launch your welcome promotion.
 - Note:** After viewing the complete promotion summary, you can edit the promotion or proceed to create it.

- Select “Create” to launch your welcome promotion and reward new loyalty members!

How to create a birthday promotion

1. Login to the Marketer Panel and select General Promotions under “Promotions.”
2. Click on the “Add New Promotion” button in the top right-hand side of the Marketer Panel.
3. Next, you can provide general information for the promotion, including the internal name, internal description, status, promotion validation period, external name, external description, and image that will be showcased to your loyalty members.

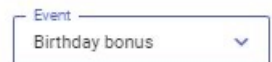
◆ **Tip:** While creating and editing your promotion, we recommend you do not change the status of your promotion to Active.

4. Provide a start/end date and end date.
 - Start date: Set a start date and time for when the promotion will be configured and launched. However, this can always be edited later.
 - End date: If you plan an ongoing birthday promotion, you may leave the end date blank, or you can provide/edit it after the promotion has been configured.
5. Create an external description and upload your external image.
 - External Description: While this section is optional, it will be displayed only on your member-facing apps (note: this feature requires API B2C integration).
 - External Image: Drag-and-drop or upload the promotional image displayed on member-facing apps (note: this feature requires API B2C integration).
6. Click on the next button to continue to the next step.

Define the promotion conditions

Next, you can define the promotion conditions for your loyalty member’s birthday.

7. Under Promoted event, select “Birthday bonus” in the drop-down menu.
 - Once selected, the promotion conditions will be set to the Member’s birthday and pre-defined for you, making it easier for your brand to celebrate with loyalty program members.
 - Click on the next button to continue to the next step.
8. Choose your incentive type by offering **points** or a **coupon**.
 - Points: The number of Basic points, with a value of one or more, will be added to the loyalty members’ account for their birthday, which can be used to redeem other coupons.
 - Coupons: You may select the coupon (that was already created), which can be shared with them.



◆ **You can create multiple incentives for a birthday promotion.**

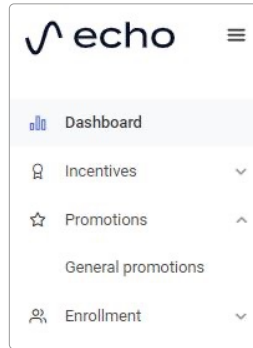
9. Get a summary and create your promotion to share with loyalty members who have provided their birthday.

Editing a birthday promotion

If you want to edit a birthday promotion, you can change the incentive (selected coupon or a point value), status, and end date after it has been started.

How to create a sale promotion

1. Log in to the Marketer Panel, and on the left-hand menu, select “Promotions” followed by “General Promotions.”



Create a new promotion

2. Select “+Add new promotion” on the top right-hand side.

+Add new promotion

3. Create an internal promotion name that can be used to identify or search for the promotion results later.

◆ You may want to use a short title, uppercase letters, and underscore to make promotions easy to find and report later. Here is an example: **“SUMMER_PROMO.”**

4. Add an internal description of the promotion.
5. Set up Status by choosing “Active” or “Inactive.”
 - Note: If the promotion is still being edited, you may set it up initially as Inactive. You can then change the promotion status to Active when ready to launch.
6. Provide a start and end date.
 - When providing a start date, ensure it will launch after you have completed creating the welcome promotion.
 - If providing an end date, first consider if you want to leave the end date blank for ongoing welcome promotions so it is continuously running.
7. Create an external promotion name (required) and external description (optional) that new loyalty members can see.
 - Please note that the external description will be displayed only on member-facing apps if you use API B2C.
8. Next, you can modify how your customers will see the promotion by using our drag-and-drop functionality to edit the displayed image for your promotion.

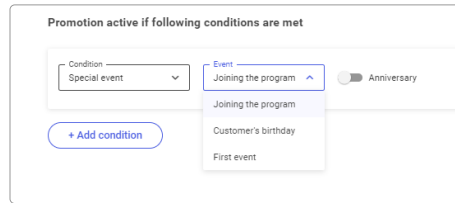
Define the promotion conditions

9. Select the event: **sale**
10. Select the condition that triggers the promotion mechanism (purchase, transaction value, coupon and special event).

- Any purchase: Will be triggered with any purchase made by a member.
- Transaction value: You may choose the value and select if the purchase value should be “more than” a select amount, “more than or equal to” a select amount, or choose the “between” settings option to encourage spending by offering other benefits when reaching a new range.

- Coupon: If you select coupon it must be configured in the system with the distribution mode set up prior.

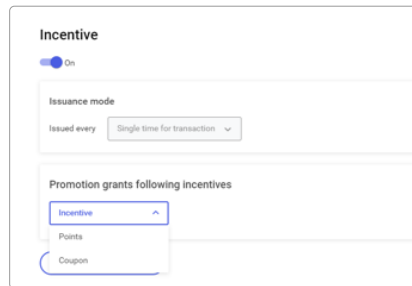
- If you select special event, you may choose from the selection of events such as the event of joining the program, their birthday, and their first purchase.



- ◆ Tip: Additional conditions can be added to one Sale Promotion. For example, we can reward customers on their first purchase when they spend over \$50.

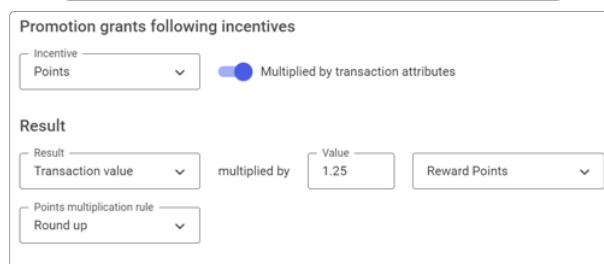
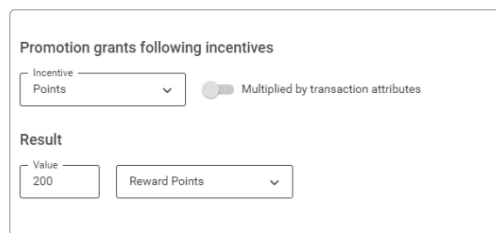
Reward members and configure incentive type

Decide how to incentivize your members and select Points or a Coupon.



11. Points

- Select a fixed Value and click on Type to select Reward Points.
- Activate the Multiplied by transaction attributes and give points based on spend.



12. Coupon

- A coupon needs to be already configured in the system.
- Select a coupon you would like to add.
- System shows only coupons configured with the Distribution mode set up as Promotion. Select the coupon that should be added to the promotion.

Promotion grants following incentives

Incentive
 Coupon ▾

Select coupon ▾

[More](#)

- After selecting a coupon, the system will show details of the coupon.

Select coupon

Name	Code	Delivery channels
10_DISCOUNT	8z2YnpHMe7X8Vew5twXR	POS

Promotion grants following incentives

Incentive
 Coupon ▾

10_DISCOUNT ▾

10_DISCOUNT

Coupon incentive

Discount: 10 Percent

Apply to whole ticket

Multiplied by value of transaction which used the coupon

Multiplication rule: Natural round the discount value

Usage repeatability rule

Valid 1 time(s)

Check the promotion summary

The system will display all detailed information about your new promotion. Use the time to determine if you would like to proceed.

13. Create Promotion.

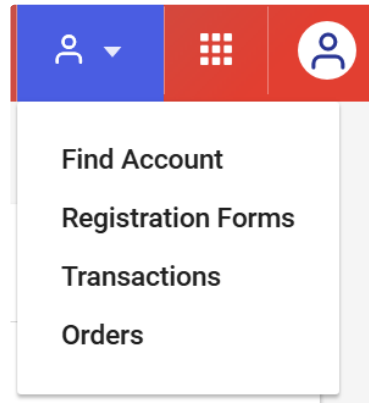
Create

Customer Care Panel

Navigation

Accounts menu

On the top right corner of the page, you can find the “Accounts Menu” and the search option to find members by name.

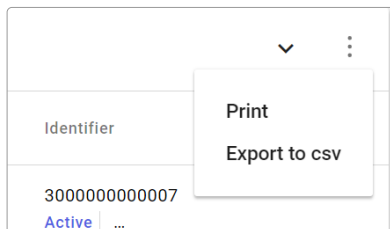


Dashboard

- On the main page, you can find a dashboard with the list of members:

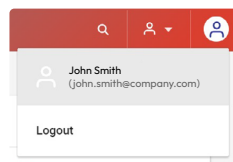
Account Status	Customer	Address	E-mail	Identifier
Active	Owner	United States of America		3000000000007 Active ...

- By clicking on the three dots, you can export or print the table:



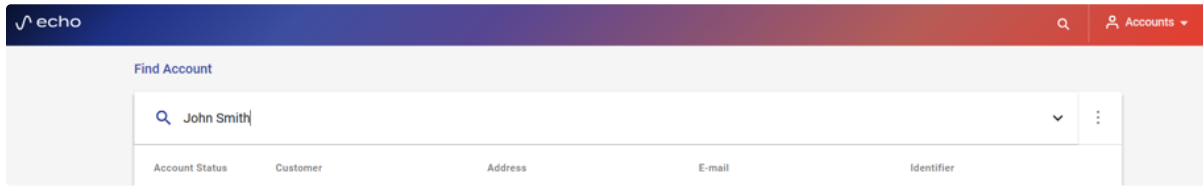
My profile

- To logout you can go to the right top corner “My profile” icon:

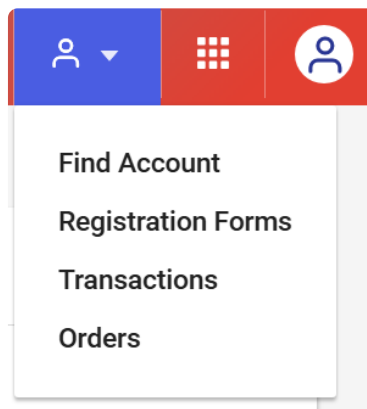


How to find a member's account

1. The upper browser helps to find customers based on their email, ID number, or Last Name.



2. You can also find a member by using the top right corner options of the member menu and the browse icon:



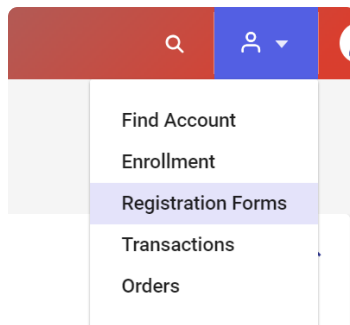
How to enroll a member using the Customer Care Panel

Please see the Member Enrollment Section.

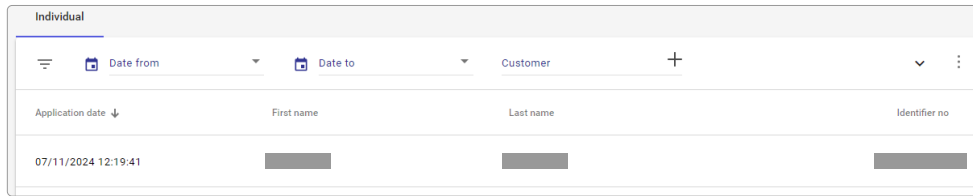
How to find member enrollment information

1. Go to the top right corner member menu.
2. Select Registration Forms.

This section allows you to see all the enrollments you've had per date and your first name, last name, and identifier number.

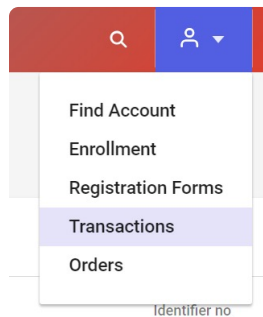


How to find member transactions



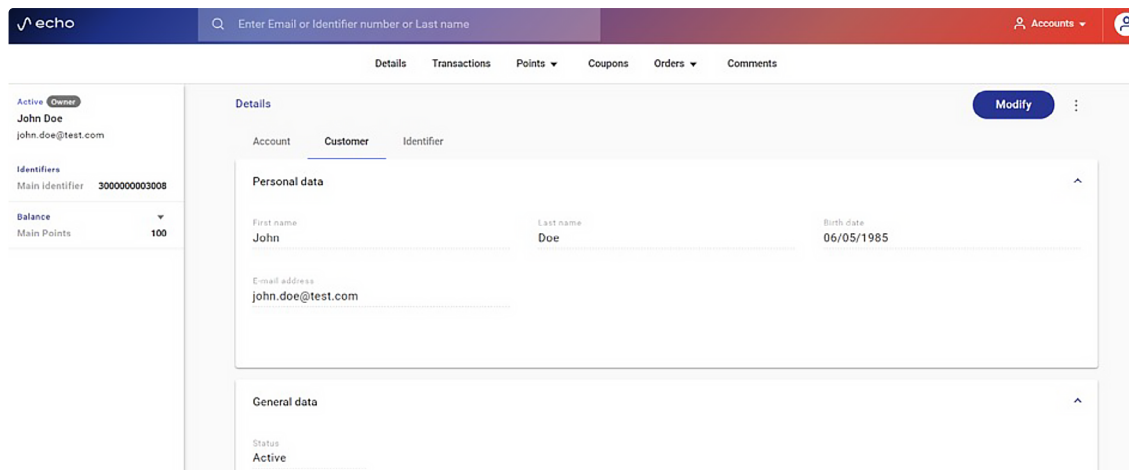
1. Go to the top right corner member menu.
2. Select Transactions.

This section allows you to see all members' transactions over a period of time, as well as the type, status, and value.



How to find member information

1. Find a loyalty member account using their name in the upper ribbon.
2. From the upper menu, select Details to find all member's data (first name, last name, birth date, email, and general data). The member's name, email, ID number, and points balance are in the left panel.



View a member's transactions

All members' transactions are displayed, and each transaction can be viewed in detail.

Transaction base details

Transactions list							
Date ↓	Type	Partner	Identifier no	Channel	Total value	Points	Status
05/23/2024	Program vendor correction	Loyalty program		Customer Care Panel	-	100	Booked
05/23/2024	Member registration		3000000000007	External system	-	100	Booked

If you click on any transaction from the transactions list, the following information will be displayed: Type, Transaction date, Processing date, Created by, Status, Partner, Location, Channel, and Points issued.

← Transaction

Base details

Type
Program vendor correction

Transaction date: 05/23/2024 04:33:22 Processing date: 05/23/2024 04:33:22 Created by: Status: Booked

Partner: Loyalty program Location: Channel: Customer Care Panel Identifier no:

Cashier id: External transaction number:

Comment: Points: 100

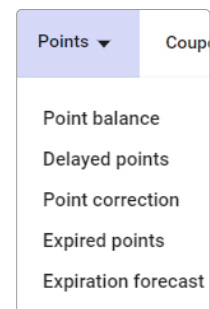
Transaction that triggered anti-fraud rules

Points corrections details

How to find member point data

Under the points drop-down menu, you can find the following information:

- Point balance
- Delayed points
- Point correction
- Expired points
- Expiration forecast

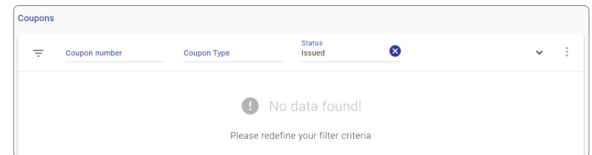


How to correct points for a loyalty member

1. Go to the Loyalty Member’s profile.
2. Under “Points” select “Point correction.”
3. Edit points for your loyalty member
 - **Points can manually be added or subtracted** using the Customer Care Panel.
 - All mandatory fields have to be filled out (Amount, Point Type, Expiration Date, Partner, and Default reason), and the corrected option has to be selected if you are adding (plus) or subtracting points (minus).
 - A correction will be displayed on the transactions tab.

Member coupons

This section details member coupons: coupon **number**, **type**, and **status**.



Member’s orders

This section allows access to member reward order history and enables ordering a reward on behalf of the member.

Adding comments

- Click on the ADD button and add a comment.
- Your comment will be visible to other Customer Care Panel users.



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