



autocconnect guide

SPRINGBIG

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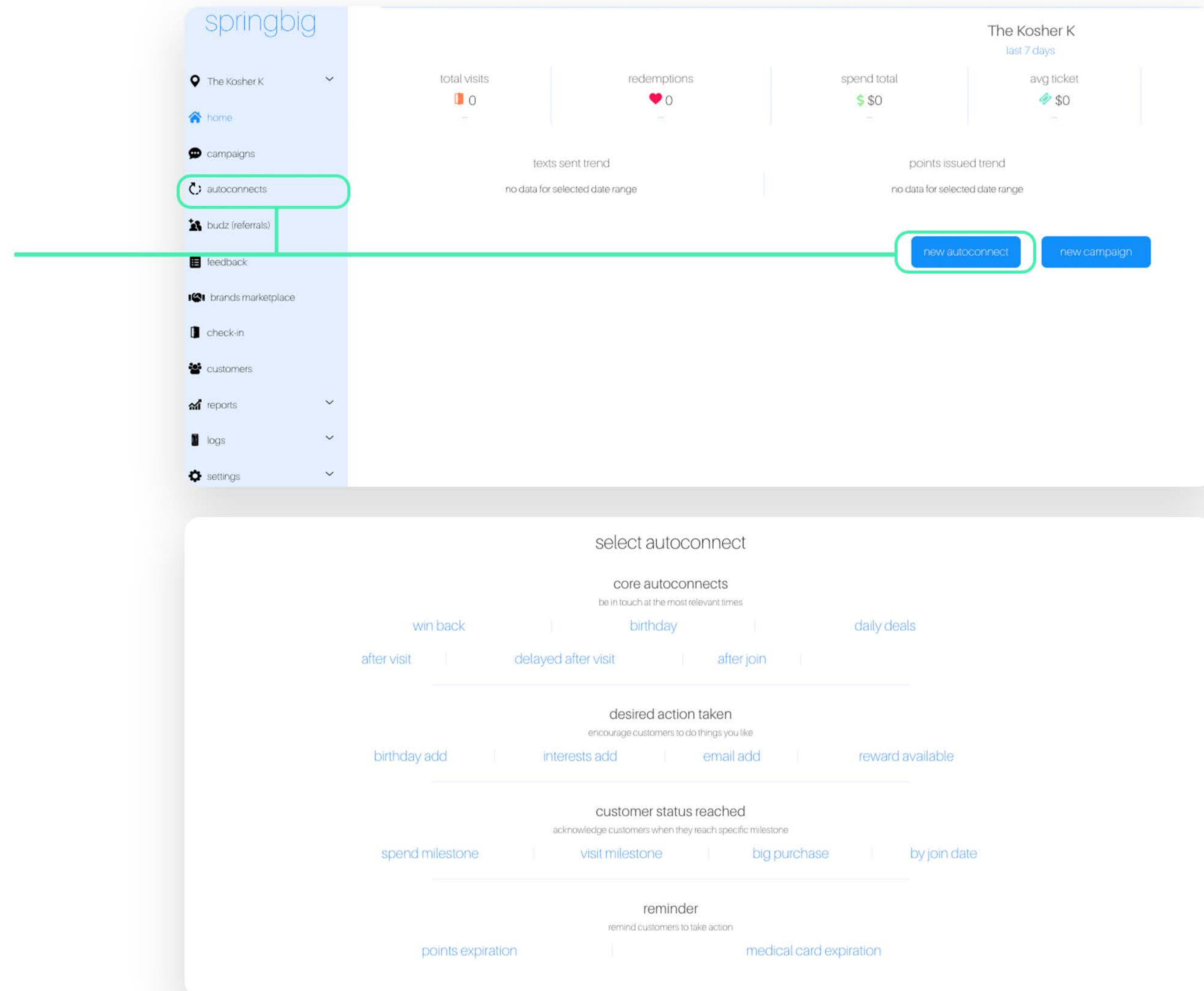
chapter 1

overview of dashboard

you can easily reach your **springbig autoconnect menu** from the dashboard by either clicking the **new autoconnect** button from the homepage, or from the **autoconnects** option from the side-menu

from the **autoconnect menu**, simply select the type of **autoconnect** you would like to **create**

prior to going into each autoconnect individually, we're going to talk about the general **autoconnect dashboard** which will apply to all of them



in this chapter, you will learn about the general overview of the autoconnects dashboard. everything mentioned in this chapter will apply to all autoconnects. we will go into detail for each autoconnect in the following chapters

in this field, you will be prompted to enter the **name of your autoconnect**

click here to check out the **different filters** you can apply to each audience. you can filter by **location, interests, brands**, etc.

this is the **textbox** where you type out the message you want to send to your customer

in the message, you can also include:

- ☒ a photo
- ☒ emojis
- ☒ customer info

select the **notification message** you would like your members to see

choose an image to be attached to the autoconnect (**optional**)

The screenshot shows the 'new autoconnect: win back' dashboard. It is divided into two main sections: 'configure autoconnect settings' on the left and 'pick audience(s) and create messages' on the right. The left section includes a 'status' toggle set to 'disabled', a 'name (for your reference)' text input field with a red border and a red error message 'autoconnect must have a name', and a '+ filters' button. The right section includes an 'audience id: #86405' field, a 'stashboard creator' section with a large text area and a sidebar with icons for 'track offer', 'target wallet', and 'any link', a 'select a notification message' section with a dropdown menu, and a 'select mms notification image (recommended)' section with a camera icon and a 'select image' button. At the bottom, there is a 'credit summary' section showing 'characters 0, credits 1'. Red lines connect the text on the left to the corresponding elements in the dashboard.

new autoconnect: win back

configure autoconnect settings

status: disabled

name (for your reference)

autoconnect must have a name

+ filters

audience id: #86405

+ audience

stashboard creator

use the creator below to craft whatever message you want! add text, creative images, and extensions to your campaign and we will generate a stashboard for your members (see tutorial)

select an icon above to add a link for a digital coupon, target a specific part of the wallet or link to any website

track offer, target wallet, any link

select a notification message

choose a message to send your members as a text, and we will include a secure link to the stashboard you've created above

select sms notification message

select mms notification image (recommended)

select image

credit summary

characters 0, credits 1

now we will go into detail about each **autoconnect feature** (track offer, target wallet, and any link). keep in mind that these features apply to all autoconnects, although some work better with particular autoconnects. we will begin with **track offer**, specifically the offer type **digital voucher**

the purpose of the **digital voucher** track offer is to provide your customer with a **digital coupon or voucher** they can redeem for a certain period of time

in this field, you will be prompted to enter the offer, in other words, enter the **name of the offer**

here, you will indicate the **expiration time frame** for the offer (**in days**)

The screenshot shows a mobile app interface for creating a 'track offer'. At the top, there are three tabs: 'track offer' (selected), 'target wallet', and 'any link'. Below the tabs is a section titled 'offer type' with three buttons: 'digital voucher' (highlighted with a green box), 'bonus points', and 'instant points'. Below this is a text input field labeled 'offer for customer'. Below that is a dropdown menu labeled 'offers per customer' with the value '1' and a downward arrow. Below the dropdown is a text input field labeled 'offer expires after', followed by a label 'days'. At the bottom, there are two sections: 'preload image' with the subtext 'sends with your text' and 'voucher image' with the subtext 'displays on customer voucher'. A 'cancel' button is at the very bottom right. Green lines connect the explanatory text on the left to the corresponding fields in the form.

this dropdown menu allows you to select **how many times** the customer can redeem the offer. you can choose from **1-5, 10, or unlimited**

note: selecting **unlimited** allows the customer to use the offer as many time as they want

you can **attach an image** to be shown when the customer receives the text offer. this is recommended because it helps to **spruce up your offers** in your wallet

now that we've spoken about the digital voucher offer type, we will go into detail about how you can utilize the **bonus points** offer type. keep in mind that these features apply to all autoconnects

the purpose of the **bonus points** track offer is so that you can reward your customers with bonus points when they spend a minimum amount of money at your store

in this field, you will be prompted to enter the offer, in other words, enter the **name of the offer**

The screenshot shows a mobile app interface for creating a 'bonus points' track offer. At the top, there are three tabs: 'track offer' (selected), 'target wallet', and 'any link'. Below the tabs, the 'offer type' section has three buttons: 'digital voucher', 'bonus points' (selected), and 'instant points'. The 'offer for customer' section contains a text input field. The 'bonus type' section has two buttons: '+ add' (selected) and 'x multiply'. The 'bonus value' section contains a text input field. The 'offers per customer' section contains a text input field. Green lines connect the explanatory text on the left to the corresponding fields in the form.

here, you select the **bonus type**, which determines the **calculation method** that will be used to compute the amount of points awarded to a customer

- ☒ clicking on **+** will **add** an exact amount of bonus points
- ☒ clicking on **x** will **multiply** the bonus value by the number of points earned

the **bonus value** is the number you want to add or multiply by to determine their **bonus point total**

this dropdown menu allows you to select **how many times** the customer can redeem the offer. you can choose from **1-5, 10, or unlimited**

note: selecting **unlimited** allows the customer to use the offer as many time as they want

in this field, you will determine the **minimum purchase amount** that the customer must make to receive those bonus points

The screenshot shows a mobile app interface for creating a 'track offer'. At the top, there are three tabs: 'track offer' (selected), 'target wallet', and 'any link'. The form contains several fields and a checkbox, each highlighted with a green box and a line pointing to an explanatory text block on the left or right.

- offers per customer:** A dropdown menu currently showing '1'.
- offer expires after:** A text input field.
- days:** A label below the 'offer expires after' field.
- min purchase amount:** A text input field currently showing '\$0.00'.
- POS discount ID (optional):** A text input field.
- POS discount ID (optional):** A dropdown menu currently showing '0.00'.
- preload image:** A checkbox.
- sends with your text:** A label below the 'preload image' checkbox.
- issue bonus point offer to members who would qualify for this message but are not opted in (member offer):** A checkbox.

in this field, you will indicate the **expiration timeframe** for the offer (**in days**)

you are able to add your **POS discount ID** if applicable

you can **attach an image** to be shown when the customer receives the text offer. this is recommended because it helps to **spruce up your wallet**

checking off this box will enable members who are **not opted into messaging** to receive the offer **via their wallet**

now that we've spoken about the bonus points offer type, we will go into detail about how you can utilize the **instant points** offer type. keep in mind that these add-ons apply to all autoconnects, although some work better with particular autoconnects

the purpose of the **instant points** track offer is to give your customers points instantly without being bound to spending anything extra. it's basically like getting a direct deposit

note: you can use this track offer to drive traffic and influence consumer behaviors

The screenshot shows a form for creating a track offer. At the top, there are three tabs: 'track offer' (selected), 'target wallet', and 'any link'. Below the tabs is a section labeled 'offer type' with three buttons: 'digital voucher', 'bonus points', and 'instant points' (selected). Below this is a text input field labeled 'points to be issued instantly'. Below that is a button labeled 'preload image' with the text 'sends with your text' underneath it. At the bottom, there is a checkbox labeled 'Issue instant point offer to members who would qualify for this message but are not opted in (member offer)'.

in this field, you will be prompted to enter the **number of points** you would like to issue the customer

you can **attach** an **image** to be shown when the customer receives the text offer. this is recommended because it helps to **spruce up your wallet**

now that we've spoken about the all the track offer features, we will go into detail about how you can utilize the **target wallet** autoconnect feature. keep in mind that these add-ons apply to all autoconnects, although some work better with particular autoconnects

when you select the **target wallet** feature, it allows you to send your customers direct access to specific parts of their wallet

note: this is especially useful when you send the customer that you are trying to get to fill out their profile, birthday, or interests

The diagram illustrates the 'target wallet' feature selection process. It shows a button labeled 'target wallet' with a wallet icon. A green line connects this button to a dropdown menu titled 'select target'. The dropdown menu contains the following options: referral, interests, birthday, profile, home, and shop online. A second green line connects the 'select target' dropdown to a text field on the right, which is used for selecting the specific wallet destination.

track offer	target wallet	any link
	select target ☐ referral ☐ interests ☐ birthday ☐ profile ☐ home ☐ shop online	

in this field, you will be prompted to **select the specific wallet destination** that you are trying to send the customer to

note: when **BUDZ** is enabled **referral** will also appear. when a website is listed under **business website** in the **basic settings** a **shop online** checkbox will appear too

now that we've spoken about the target wallet feature, we will go into detail about how you can utilize the **any link** autoconnect feature. keep in mind that these add-ons apply to all autoconnects, although some work better with particular autoconnects

the purpose of the **any link** track add-on is to provide your customer with a link to whatever you'd like. once clicked, a pop-up will appear

note: this is especially useful if you want to include a link to your online menu to show customers how easy it is to place online orders at your store

any link

add multiple URLs to your stashboard so your customers now have a single point of access for all your important links

title*
add title
max 25 characters

url*
add url
include http:// or https://

thumbnail image
upload icon

add new link

previously used URLs

title	url	thumbnail image
× http://www.youtube.com/watch?v=7aodh0280nk	www.youtube.com/watch?v=7aodh0280nk	globe icon
× http://www.youtube.com/watch?v=7aodh0280nk	www.youtube.com/watch?v=7aodh0280nk	globe icon
× https://www.youtube.com/watch?v=7aodh0280nk	www.youtube.com/watch?v=7aodh0280nk	globe icon

in this field, you will be prompted to enter the **full url (any link)** that you would like the customer to be taken to

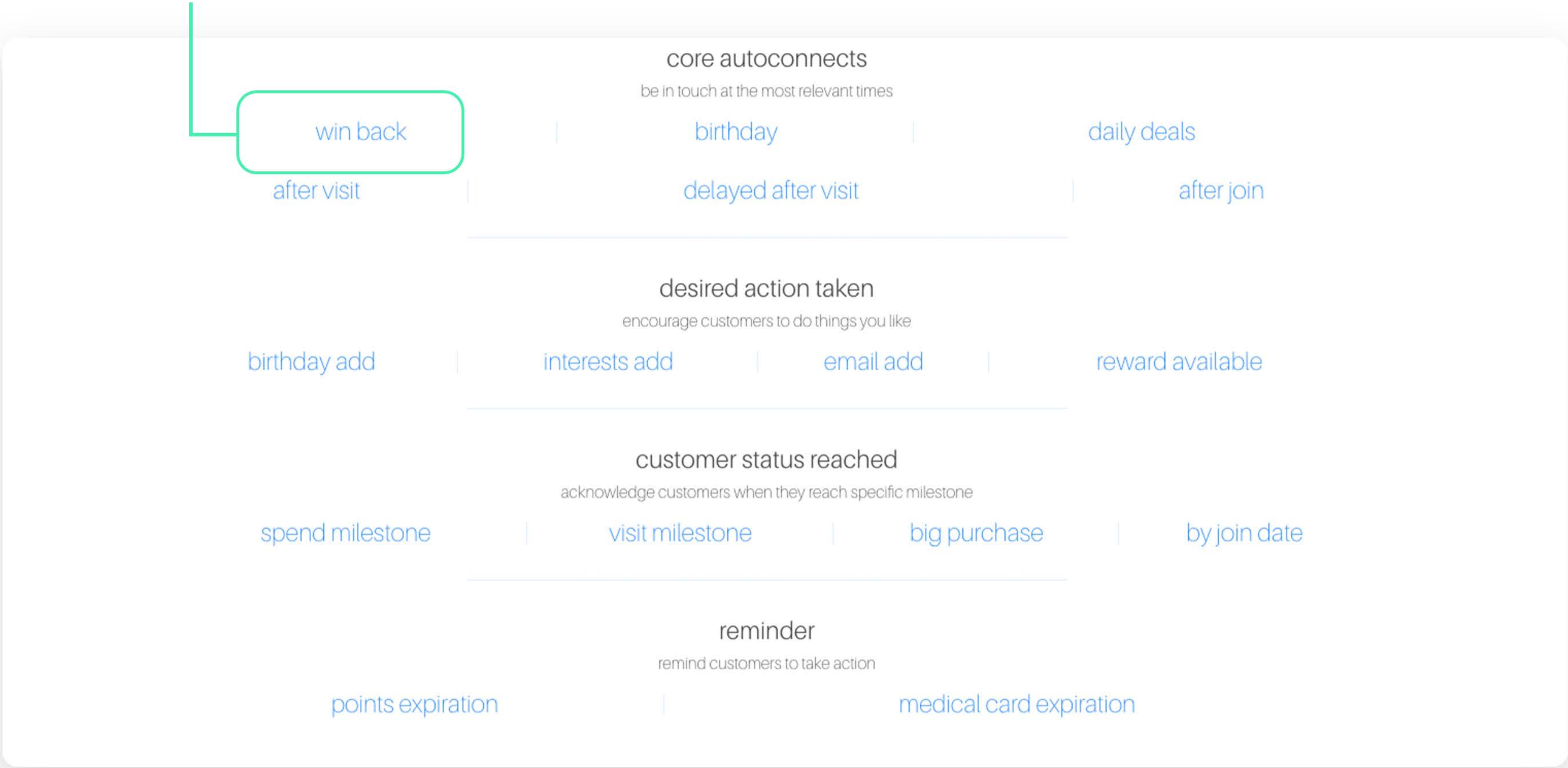
note: you are able to add a **title** and a **thumbnail image** to the any link

chapter 2

core autocconnects

this group of **autoconnects** was created so that you can keep intouch with your customers and rewards them at the most relavant times. they allow you to provide them with incentivized messaging to keep them coming back to your store. whether it's sending them a birthday discount, sending them your store's daily deals, or simply trying to get them to shop with you if they haven't done so in a while, there is an autoconnect for you

we will begin with the **win back** autoconnect and go through the list respectively



the purpose of this autoconnect is to **win back** customers that have not visited your store in a while, giving you the ability to reconnect with a customer to get them back in your store **before** they become the one that got away

new autoconnect: win back

configure autoconnect settings

status
disabled ☐

name (for your reference)

☐ once ☒ multiple

every days

min days since visit

max days since visit

time to send

Eastern Time (US & Canada)
currently 04:22pm

pick audience(s) and create messages for that audience. you can create multiple audiences (i.e. boca and flowers, boca and edibles). for each audience, you can create multiple messages to cycle through (i.e. different message every time receiving 'win back' or 'after visit').
if customers belong to multiple audiences the audience with the highest priority will be applied.

+ audience

audience id: #86471

+ filters

stashboard creator
use the creator below to craft whatever message you want! add text, creative images, and extensions to your campaign and we will generate a stashboard for your members (see tutorial)

We miss you!

☒ track offer ☐ target wallet ☐ any link

☒ digital voucher ☐ bonus points ☐ instant points

offer for customer

offers per customer

offer expires after

select a notification message
choose a message to send your members as a text, and we will include a secure link to the stashboard you've created above

Win Back 1 - Series 1
Hi %(MEMBER_FIRST_NAME)! Reminder from %(MERCHANT_DBA) about your last visit. <https://winniethepoolat.com/UnyfTrqrCSb> reply STOP to opt out

select mms notification image (recommended)


remove

credit summary
characters 124, credits 3

click here to **create multiple audiences**, issuing each a **win back** offer that is likely to grab their attention

note: be sure to create an **all** audiences and prioritize it last

remember to **apply filters** to each of your audiences like **spending total, average spend, and interests**. this allows you to send more fitting **win backs** and give better rewards to those who typically spend more

add a track offer that will be enticing to the customer of that audience

you can even try including an **any link** to your online menu, letting customers know they can easily order online at your shop

this is what you will click on to view your **stashboard message**

the purpose of this autoconnect is to send messages to your customers on their **birthday** to show them you care. utilizing this autoconnect increases the likelihood that the customer visits your store, especially if you send them targeted birthday deals or offers

when setting up a **birthday** autoconnect, we recommend setting a **specific time** for the message to be sent

create multiple audiences, gifting all of your members a birthday present that they're sure to love

note: be sure to create an **all** audience and prioritize it last

add one of our ready to use **notification images** to add enhance your notification and offers

The screenshot shows the 'configure autoconnect settings' interface. On the left, a sidebar contains settings for 'status' (disabled), 'name' ('It's your special day!'), and 'time to send' (4:20 pm). A green box highlights the 'time to send' field, with a line pointing to the text 'when setting up a birthday autoconnect, we recommend setting a specific time for the message to be sent'. Below this, another green box highlights the 'locations' field ('soho, 5th-avenue, murray-hill, long-island, brooklyn'), with a line pointing to the text 'create multiple audiences, gifting all of your members a birthday present that they're sure to love'. On the right, the 'pick audience(s)' section shows a list of audiences with a '+ audience' button and a 'delete' button. A green box highlights the '+ audience' button, with a line pointing to the text 'note: be sure to create an all audience and prioritize it last'. Below this, the 'stashboard creator' section shows a preview of a birthday message and a sidebar with options like 'offer', 'wallet', and 'link'. A green box highlights the 'offer' option, with a line pointing to the text 'add one of our ready to use notification images to add enhance your notification and offers'. At the bottom, the 'select a notification message' section shows a preview of a birthday message and a 'select mms notification image (recommended)' section with a 'Happy Birthday!' image. A green box highlights the 'Happy Birthday!' image, with a line pointing to the text 'add one of our ready to use notification images to add enhance your notification and offers'.

configure autoconnect settings

status
disabled

name (for your reference)
It's your special day!

time to send
4:20 pm

Eastern Time (US & Canada)
currently 05:18pm

pick audience(s) and create messages for that audience. you can create multiple audiences (i.e. boca and flowers, boca and edibles). for each audience, you can create multiple messages to cycle through (i.e. different message every time receiving 'win back' or 'after visit').
if customers belong to multiple audiences the audience with the highest priority will be applied.

+ audience

delete

audience id: #86475

locations: soho, 5th-avenue, murray-hill, long-island, brooklyn

+ filters

stashboard creator

use the creator below to craft whatever message you want! add text, creative images, and extensions to your campaign and we will generate a stashboard for your members (see tutorial)

Happy Birthday from your Fam at The Kosher K!!! We have something special for you, stop by today

offer

target wallet

any link

Birthday Package

offers per customer
1

offer expires after
03 days

POS discount ID (optional)

POS discount ID (optional)

select a notification message

choose a message to send your members as a text, and we will include a secure link to the stashboard you've created above

Customer Birthday 1
You have a notification from %[MERCHANT_DBA] on your special day %[MEMBER_FIRST_NAME]! https://winniethespoolat.com/UnypWuE3c21 reply STOP to opt out

select mms notification image (recommended)

Happy Birthday!

remove

configure autoconnect settings

status
disabled ☐

name (for your reference)

time to send

Eastern Time (US & Canada)
currently 05:18pm

pick audience(s) and create messages for that audience. you can create multiple audiences (i.e. boca and flowers, boca and edibles), for each audience, you can create multiple messages to cycle through (i.e. different message every time receiving 'win back' or 'after visit').
if customers belong to multiple audiences the audience with the highest priority will be applied.

+ audience

audience id: #86475 delete

+ filters

locations: soho, 5th-avenue, murray-hill, long-island, brooklyn

stashboard creator
use the creator below to craft whatever message you want! add text, creative images, and extensions to your campaign and we will generate a stashboard for your members. (see tutorial)

Happy Birthday from your Fam at The Kosher K!!! We have something special for you, stop by today

track offer target wallet any link

Birthday Package

offers per customer
1

offer expires after
03 days
POS discount ID (optional)

POS discount ID (optional)

select a notification message
choose a message to send your members as a text, and we will include a secure link to the stashboard you've created above

Customer Birthday 1
You have a notification from %(MERCHANT_DBA) on your special day %(MEMBER_FIRST_NAME)! https://winniethepoolat.com/UnypWuE3c21 reply STOP to opt out

select mms notification image (recommended)

HAPPY BIRTHDAY!

remove

credit summary

use filters like **average spend**, **spending total**, and **visiting total** to gift those high spending, high visit VIP customers

use filters like **join date** to give a special gift to customers who have been part of your program for a long time, or thank those that are spending their birthday with you

be sure to add a **track offer** to each message, and include a birthday **display image** and a **coupon image** to make sure that only the birthday person is enjoying your generosity

the purpose of this autoconnect is to **customize** and send **daily deals** to customers depending on what day of the week it is. using this autoconnect will give your customers an **incentive to visit** your store on any given day of the week because they know they get something out of it, especially if you send them targeted birthday deals or offers

when setting up a **daily deals** autoconnect, you can categorize each message based on the day of the week, this can be any day **from Sunday to Saturday**

we also recommend setting a **specific time** for the message to be sent

create multiple messages for each day of the week

add a **pre-optimized notification image** to your **daily deal** to help it stand out

configure autoconnect settings

status

disabled

name (for your reference)

Sunday Scaries?

day of the week

sunday

time to send

9:05 am

Eastern Time (US & Canada)
currently 09:45am

pick audience(s) and create messages for that audience. you can create multiple audiences (i.e. boca and flowers, boca and edibles). for each audience, you can create multiple messages to cycle through (i.e. different message every time receiving 'win back' or 'after visit').
if customers belong to multiple audiences the audience with the highest priority will be applied.

audience id: #86554

spending total: spending totals (101-500), spending totals (501-1000), spending totals (1000+)

+ filters

stashboard creator

use the creator below to craft whatever message you want! add text, creative images, and extensions to your campaign and we will generate a stashboard for your members (see tutorial)

got the Sunday Scaries?

We can fix that! Stop by today to and stock up on your favorite goodies to make your sunday far less scary 🤪

track offer

target wallet

any link

offer type

digital voucher

bonus points

instant points

offer for customer

25% off your order

offers per customer

1

offer expires after

1

select a notification message

choose a message to send your members as a text, and we will include a secure link to the stashboard you've created above

Daily Deals 1

It's %[MERCHANT_DBA] daily update just for you %[MEMBER_FIRST_NAME]! >> https://winniethespoolat.com/UnATAOq2B86 reply STOP to opt out

select mms notification image (recommended)

TODAYS UPDATE

remove

configure autoconnect settings:

status
disabled ☐

name (for your reference)

day of the week

time to send

Eastern Time (US & Canada)
currently 10:49am

pick audience(s) and create messages for that audience. you can create multiple audiences (i.e. boca and flowers, boca and edibles), for each audience, you can create multiple messages to cycle through (i.e. different message every time receiving 'win back' or 'after visit').
if customers belong to multiple audiences the audience with the highest priority will be applied.

+ audience

audience id: #80004

+ filters

stashboard creator
use the creator below to craft whatever message you want! add text, creative images, and extensions to your campaign and we will generate a stashboard for your members (see tutorial)

got the Sunday Scaries?
We can fix that! Stop by today to and stock up on your favorite goodies to make your sunday far less scary 😊

track offer target wallet any link

any link
edit

cancel

select a notification message
choose a message to send your members as a text, and we will include a secure link to the stashboard you've created above

Daily Deals 1
It's %(MERCHANT_DBA) daily update just for you %(MEMBER_FIRST_NAME)! >> https://winniethpoolat.com/UnATAOq2B86 reply STOP to opt out

select mms notification image (recommended)

TODAY'S UPDATE

remove

credit summary
characters 239, credits 6

done

using **filters** like **spending total** allows your deals to be product specific so that you can target enthusiasts of those products, in turn, increasing the likelihood of a sale

you can use the **any link** feature to increase your shop's online orders and offer deals to your customers

select a **pre-optimized notification messages** to further enhance your daily

the purpose of this autoconnect is to send a message to customers **after they visit** your store and make a purchase. you can create multiple messages in the cycle offering a more conversational tone to your customers

configure autoconnect settings

status

disabled

name (for your reference)

after visit

transaction location based after visits?

yes

no

pick audience(s) and create messages for that audience. you can create multiple audiences (i.e. boca and flowers, boca and edibles). for each audience, you can create multiple messages to cycle through (i.e. different message every time receiving 'win back' or 'after visit'). if customers belong to multiple audiences the audience with the highest priority will be applied.

audience id: #86559

+ filters

stashboard creator

use the creator below to craft whatever message you want! add text, creative images, and extensions to your campaign and we will generate a stashboard for your members (see tutorial)

Thank you for stopping bu today! we notice you have not completed your wallet, if you fill it out today enjoy 300 points on us!

track offer

target wallet

any link

select target

☐ referral

☐ interests

☐ birthday

☐ profile

☒ home

☐ shop online

cancel

select a notification message

choose a message to send your members as a text, and we will include a secure link to the stashboard you've created above

After Visit Notification

Hey %(MEMBER_FIRST_NAME), Thank you for visiting %(MERCHANT_DBA). Remember to set up your pin here > https://winniethepoolat.com/UnB6TVvaQu2 reply STOP to opt out

select mms notification image (recommended)

CAN WE TALK ABOUT TODAY?

remove

credit summary

characters 262, credits 4

if you run a **multi-location** dispensary, create an **after visit** message specifically for customers of **each of your stores**

target wallet home will take customers to their wallet, this is a perfect extension for your **after visit** texts

note: to entice customers to provide their birthday, interests, or email, **offer a discount** once the information is filled in and create another autoconnect to fulfill the promise

periodically **award small offers** to customers, ask for updated interests, or remind customers that they can order online

this autoconnect is in place if you prefer to send a message to your customers a **few days after they visit**, rather than sending it the same day of their visit. with this autoconnect you can ask your customers for **reviews**, send them **surprise offers**, or even just make them aware of **your menu**

in this field, you can **determine how many days after** the customer visits your store that you would like your message to be sent to them

note: we also recommend setting a **specific time** for the message to be sent

configure autoconnect settings

status
disabled

name (for your reference)
since you've been gone!!!

of days after visit
21

time to send
9:05 am

Eastern Time (US & Canada)
currently 11:49am

pick audience(s) and create messages for that audience. you can create multiple audiences (i.e. boca and flowers, boca and edibles). for each audience, you can create multiple messages to cycle through (i.e. different message every time receiving 'win back' or 'after visit').
if customers belong to multiple audiences the audience with the highest priority will be applied.

+ audience

audience id: #86566

+ filters

stashboard creator
use the creator below to craft whatever message you want! add text, creative images, and extensions to your campaign and we will generate a stashboard for your members (see tutorial)

here's the thing...a lot has happened since you've been gone! stop by today to receive an extra 360 bonus points!

track offer

target wallet

any link

offer type
digital voucher
bonus points
instant points

offer for customer
360

bonus type
+ add
x multiply

bonus value
1

select a notification message
choose a message to send your members as a text, and we will include a secure link to the stashboard you've created above

Delayed After Visit 1
%[MERCHANT_DBA] wants to update you about your recent visit %[MEMBER_FIRST_NAME]! https://winniethepoolat.com/UnBgA0ExKKD reply STOP to opt out

select mms notification image (recommended)

NEW MESSAGE

remove

credit summary
characters 114, credits 3

done

delete

configure autoconnect settings

status
disabled

name (for your reference)
since you've been gone!!!

of days after visit
21

time to send
9:05 am

Eastern Time (US & Canada)
currently 11:49am

pick audience(s) and create messages for that audience. you can create multiple audiences (i.e. boca and flowers, boca and edibles). for each audience, you can create multiple messages to cycle through (i.e. different message every time receiving 'win back' or 'after visit').
if customers belong to multiple audiences the audience with the highest priority will be applied.

+ audience

audience id: #86566

+ filters

stashboard creator

use the creator below to craft whatever message you want! add text, creative images, and extensions to your campaign and we will generate a stashboard for your members (see tutorial)

here's the thing...a lot has happened since you've been gone! stop by today to receive an extra 360 bonus points!

offer type

digital voucherbonus pointsinstant points

offer for customer

360

bonus type

+ addx multiply

bonus value

1

select a notification message

choose a message to send your members as a text, and we will include a secure link to the stashboard you've created above

Delayed After Visit 1

%[MERCHANT_DBA] wants to update you about your recent visit %[MEMBER_FIRST_NAME]: https://winniethepoolat.com/UnBgA0Exkk0 reply STOP to opt out

select mms notification image (recommended)

NEW MESSAGE

remove

credit summary

characters 114, credits 3

done

click here to create an **audience** with a **brands or category filters** applied

note: this way you can send a message with an **any link** extension, letting customers know if they enjoyed product from a **certain brand**, or enjoy a **certain category**, they can check out more similar products

adding **bonus points** to this autoconnect, will help incentivize your members to stop by and complete a transaction

the purpose of the **after join** autoconnect is to welcome new customers to your shop and essentially make a **good first impression**. your join message should be crafted to suit your brand and show new comers that you are thankful they joined your program

new autoconnect: after join

configure autoconnect settings
status
disabled ☐

name (for your reference)
180 extra after join

pick audience(s) and create messages for that audience. you can create multiple audiences (i.e. boca and flowers, boca and edibles). for each audience, you can create multiple messages to cycle through (i.e. different message every time receiving 'win back' or 'after visit').
if customers belong to multiple audiences the audience with the highest priority will be applied.

+ audience

audience id: #86608

+ filters

stashboard creator
use the creator below to craft whatever message you want! add text, creative images, and extensions to your campaign and we will generate a stashboard for your members (see tutorial)

Thank you for joining! enjoy 180 extra points from your fam at The Kosher K

offer type
digital voucher | **bonus points** | instant points

offer for customer
180 extra points

bonus type
+ | X
add | multiply

bonus value
180

select a notification message
choose a message to send your members as a text, and we will include a secure link to the stashboard you've created above

After Join 1
You are now a part of %(MERCHANT_DBA). We have great things coming your way %(MEMBER_FIRST_NAME): https://winniehepoolat.com/UnExPKPOa9
reply STOP to opt out

select mms notification image (recommended)

Thanks For Joining

remove

credit summary
characters 207, credits 4

done

delete

include a **track offer** with a quickly approaching expiration date in your **join message**, encouraging first time customers to become repeat visitors from the start

create a **bonus point track offer** with enough bonus points for the customer to redeem the first level reward, this will make them feel valued, thus more likley to be a repeat customer

try to include a message with an **any link** to your website or online menu, capitalizing on the opportunity to further immerse your new member into your culture

chapter 3

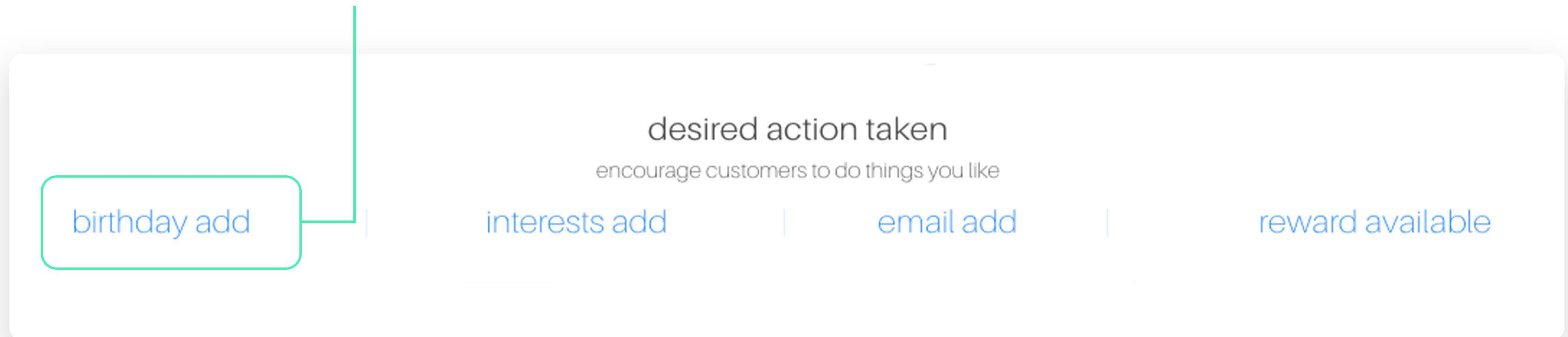
desired actions taken autoconnects

the **desired action taken autoconnects** were created so that you could **gather customer information** as needed. create autoconnects that reward your members for telling you about themselves. you can capture info like their **birthday, interests, and email**. this will go a long way in helping collect valuable customer data, and will be most effective when complimented by other communications from your store

encourage your staff to educate your members on how to access their personal wallet, and if they share some information about themselves they'll **immediately be rewarded**. this will make a major difference in the amount of customer data you collect

if you just imported a big list, you have the perfect opportunity to **request customer information**. create an **information given autoconnect** and send a target wallet campaign letting customers know that they will immediately earn rewards just for telling you about themselves!

we will begin with the **birthday add autoconnect** and go through the list respectively



the **birthday add** autoconnect is in place to help you incentivize customers to fill out their birthday info in their wallet. capturing information like their birthday allows you to send custom messages with unique deals and offers to your customers on their special day

configure autoconnect settings

status
disabled

name (will display on wallet)
10% birthday add

pick audience(s) and create messages for that audience. you can create multiple audiences (i.e. boca and flowers, boca and edibles). for each audience, you can create multiple messages to cycle through (i.e. different message every time receiving 'win back' or 'after visit').
if customers belong to multiple audiences the audience with the highest priority will be applied.

+ audience

audience id: #6380

+ filters

stashboard creator
use the creator below to craft whatever message you want! add text, creative images, and extensions to your campaign and we will generate a stashboard for your members (see tutorial)

High there! We noticed you have not filled out the birthday field on your profile 😊...dont sweat it, click the link provided to add your birthday and receive some awesome rewards for your special day!!!

select target

- ☐ referral
- ☐ interests
- ☒ birthday
- ☐ profile
- ☐ home
- ☐ shop online

cancel

select a notification message
choose a message to send your members as a text, and we will include a secure link to the stashboard you've created above

birthdayadd_test
Birthday Add AC for everyone https://b.txtmsg1.com/doXh5P6HJ5 reply STOP to opt out

credit summary
characters 202, credits 2

done

delete

click here to **create multiple audiences with different filters** so that you're offering specific deals targeting customers who will likely use the reward granted

target wallet birthday will take customers to their wallet, which is perfect if you're trying to get them to fill out the birthday field

note: to entice customers to provide their birthday, you should **offer a discount** once the information is filled in and create another autoconnect to fulfill the promise

note: with the **birthday** autoconnect being the **most utilized** autoconnect, **birthday add** is imperative to ensure you obtain all your members birthdays to reward them on their special day

note: whatever you name this autoconnect will be displayed to your members in their wallet

the [interest add](#) autoconnect is in place to help you incentivize customers to fill out the interest field in their wallet. capturing information like interests helps you send your members targeted messages because you're able to filter down to the type of messages they would be interested in receiving

new autoconnect: interests add

configure autoconnect settings
status
disabled
name (will display on wallet)
What interests you?

pick audience(s) and create messages for that audience. you can create multiple audiences (i.e. boca and flowers, boca and edibles). for each audience, you can create multiple messages to cycle through (i.e. different message every time receiving 'win back' or 'after visit'). if customers belong to multiple audiences the audience with the highest priority will be applied.

+ audience

audience id: #86622

+ filters

stashboard creator
use the creator below to craft whatever message you want! add text, creative images, and extensions to your campaign and we will generate a stashboard for your members (see tutorial)

High there! why have you not told us what you like yet? you could be getting custom deals based on your interests!!! fill it out today and receive 180 instant points! % (MEMBER_BALANCE)

offer type
digital voucher
bonus points
instant points

offer for customer
interest add 180 points

bonus type
+ add
X multiply

bonus value
180

select a notification message
choose a message to send your members as a text, and we will include a secure link to the stashboard you've created above

Interest Add 1
Hello % (MEMBER_FIRST_NAME) this is to confirm your interest selection for % (MERCHANT_DBA) > https://winnethepoolat.com/UnExeYIEbOe reply STOP to opt out

select mms notification image (recommended)

select image

credit summary
characters 168, credits 2

done

delete

using the [custom wallet link](#) at the end of your notification message will guide members directly to their wallet, which is perfect if you're trying to get them to tell you about what they like

note: to entice customers to provide their interest, you can [offer instant points](#) once the information is filled in and create another autoconnect to fulfill the promise

you can also just use the [target wallet interest](#) to take customers to their wallet to fill out the interest field

note: whatever you name this autoconnect, will be displayed to your members in their wallet

the **email add** autoconnect is in place to help you incentivize customers to provide you their email address. capturing information like an email address enrolls them into your email campaigns, which is another way to communicate with your members with **limited restrictions**

new autoconnect: email add

configure autoconnect settings
status: disabled
name (will display on wallet): lets connect!

pick audience(s) and create messages for that audience. you can create multiple audiences (i.e. boca and flowers, boca and edibles), for each audience, you can create multiple messages to cycle through (i.e. different message every time receiving 'win back' or 'after visit'). if customers belong to multiple audiences the audience with the highest priority will be applied.

+ audience

audience id: #86624

+ filters

stashboard creator
use the creator below to craft whatever message you want! add text, creative images, and extensions to your campaign and we will generate a stashboard for your members (see tutorial)

High there! want to get 10% off your next purchase? All you have to do is add your email to your profile within the next 3 days. click the attached link to get started today!

select target

- ☐ referral
- ☐ interests
- ☐ birthday
- ☒ profile
- ☐ home
- ☐ shop online

cancel

select a notification message
choose a message to send your members as a text, and we will include a secure link to the stashboard you've created above

Email Add 1
Hello %(MEMBER_FIRST_NAME) this is to confirm your email update for %(MERCHANT_DBA) >> https://winthepoolat.com/UnEZEZDupId reply STOP to opt out

select mms notification image (recommended)

select image

credit summary
characters 295, credits 2

done

target wallet profile will take customers to their wallet, where they can fill out information like their **email, phone number, and name**

note: to entice customers to provide their email address, you should **offer a discount** once the information is filled in and create another autoconnect to fulfill the promise

note: with email campaigns, you are able to send your campaigns to members with **minimal to no restrictions**, enabling you to send your daily deals, menus, etc

note: whatever you name this autoconnect, will be displayed to your members in their wallet

the **reward available** autoconnect is in place to notify members that they have an active and new reward in their wallet. this is a great way to motivate your members to come back into your store to make a new purchase

new autoconnect: reward available

configure autoconnect settings

status

disabled ☐

name (for your reference)

Reward available

pick audience(s) and create messages for that audience. you can create multiple audiences (i.e. boca and flowers, boca and edibles). for each audience, you can create multiple messages to cycle through (i.e. different message every time receiving 'win back' or 'after visit'). if customers belong to multiple audiences the audience with the highest priority will be applied.

+ audience

audience id: #86625

+ filters

stashboard creator

use the creator below to craft whatever message you want! add text, creative images, and extensions to your campaign and we will generate a stashboard for your members (see tutorial)

You've earned it! make sure you use it before its gone, there is a reward in your wallet that is now available for you to use, don't miss out!

track offer target wallet any link

select target

☐ referral

☐ interests

☐ birthday

☒ profile

☐ home

☐ shop online

cancel

select a notification message

choose a message to send your members as a text, and we will include a secure link to the stashboard you've created above

Reward Available

Hi %(MEMBER_FIRST_NAME) we want to notify you that you can redeem your points at %(MERCHANT_DBA): https://WinnieThePoolat.com/UnF0S0hpwW1

reply STOP to opt out

select mms notification image (recommended)

YOU'VE EARNED IT!

remove

credit summary

characters 271, credits 4

done

reward available will only notify the member regarding their new reward. this notification message meant to motivate your members to come back into your store to redeem their reward

note: if you plan to target multiple **audiences** and a member belongs to multiple audiences, the **highest priority** will be applied

note: don't forget to add a pre-optimized **notification image** to enhance your autoconnect

note: this autoconnect will send out once the member becomes eligible for a reward in their wallet as a gentle reminder

chapter 4

customer status reached
autoconnects

the purpose of this autoconnect is to reward your members for hitting a certain **spend milestone** or reaching a new tier. running a spend status incentive program raises your loyalty program to an elite level, proving incredibly effective for your highest tier customers

in this field, indicate the **spend milestone** (in dollars) that the members must meet to reach the new tier and receive a reward

optional: this configuration allows you to set a **timeframe** by which the customer must reach the spend milestone for their reward and whether or not they receive an **after visit sms** after doing so

use by join date and spending total filters to incentivize members to spend more with you and reward those who have hit your milestones

create random, personalized rewards at different, seemingly random spend marks, issuing the powerful surprises and delightful rewards to members and they further immerse themselves in your brand

configure autoconnect settings

status

disabled

name (will display on wallet)

Golden

spend milestone

1800

- add configuration

within timeframe (days)

180

send after visit sms for this transaction?

yes

milestone start date

all time

date

new autoconnect: spend milestone

pick audience(s) and create messages for that audience. you can create multiple audiences (i.e. boca and flowers, boca and edibles). for each audience, you can create multiple messages to cycle through (i.e. different message every time receiving 'win back' or 'after visit'). if customers belong to multiple audiences the audience with the highest priority will be applied.

+ audience

audience id #86772

spending total: spending totals (1000+)

+ filters

stashboard creator

use the creator below to craft whatever message you want! add text, creative images, and extensions to your campaign and we will generate a stashboard for your members (see tutorial)

Mazel Tov on becoming one of The Kosher K's golden members!!!! we are super thankful that you support us so much that we want to return the favor. Hats off to you, l'chaim!

track offer

target wallet

any link

offer type

digital voucher

bonus points

instant points

offer for customer

3.6x points per transaction

bonus type

+ add

x multiply

bonus value

3.6

select a notification message

choose a message to send your members as a text, and we will include a secure link to the stashboard you've created above

Spend Milestone 1

Hey %(MEMBER_FIRST_NAME), This is a notification from %(MERCHANT_DBA) to update you on your status > https://winwiththepoolat.com/Uohmdpwpxkf/ reply STOP to opt out

select mms notification image (recommended)

select image

credit summary

characters 309, credits 3

done

delete

the purpose of this autoconnect is to reward your members for hitting a certain **visit milestone**. this allows you to look out for your small timers by offering a very small reward at **certain visit intervals**, allowing you to offer visits based consolation rewards to members at a very low cost

in this field, indicate the **visit milestone (in days)** that the member must reach to receive a reward

optional: add a configuration that allows you to set a **timeframe** by which the member must reach the visit milestone for their reward and whether or not they receive an **after visit sms** after doing so

take advantage of **early visit milestones** and let members know about your online menu or other aspects of your business, ensuring all members know what they need to

configure autoconnect settings

status
disabled

name (for your reference)
18th visit 18% off

visit milestone
18

- add configuration within timeframe (days)
180

send after visit sms for this transaction?
yes

pick audience(s) and create messages for that audience. you can create multiple audiences (i.e. boca and flowers, boca and edibles). for each audience, you can create multiple messages to cycle through (i.e. different message every time receiving 'win back' or 'after visit').
if customers belong to multiple audiences the audience with the highest priority will be applied.

+ audience

audience id: #86774

+ filters locations: soho, 5th-avenue, murray-hill, long-island, brooklyn

stashboard creator
use the creator below to craft whatever message you want! add text, creative images, and extensions to your campaign and we will generate a stashboard for your members (see tutorial)

High! thank you for stopping at The Kosher K! Great news, this is your 18th visit, which means you get to enjoy 18% off your next 3 purchases!!!!
Mazel Tov!

offer type
digital voucher bonus points instant points

offer for customer
18% off

offers per customer
3

offer expires after
180

select a notification message
choose a message to send your members as a text, and we will include a secure link to the stashboard you've created above

Visit Milestone 1
Hey %([MEMBER_FIRST_NAME]). This is to let you know that you have achieved a new milestone at %([MERCHANT_DBA]) >
https://winniehappoolat.com/UchoDqQnDod reply STOP to opt out

select mms notification image (recommended)

You're on a Roll!

remove

credit summary
characters 301, credits 4

done

delete

configure autoconnect settings

status

disabled

name (for your reference)

18th visit 18% off

visit milestone

18

- add configuration within timeframe (days)

180

send after visit sms for this transaction?

yes

pick audience(s) and create messages for that audience. you can create multiple audiences (i.e. boca and flowers, boca and edibles). for each audience, you can create multiple messages to cycle through (i.e. different message every time receiving 'win back' or 'after visit'). if customers belong to multiple audiences the audience with the highest priority will be applied.

+ audience

audience id: #86774

+ filters

locations: soho, 5th-avenue, murray-hill, long-island, brooklyn

stashboard creator

use the creator below to craft whatever message you want! add text, creative images, and extensions to your campaign and we will generate a stashboard for your members (see tutorial)

High! thank you for stopping at The Kosher K! Great news, this is your 18th visit, which means you get to enjoy 18% off your next 3 purchases!!!!
Mazel Tov!

offer type

digital voucher

bonus points

instant points

offer for customer

18% off

offers per customer

3

offer expires after

180

select a notification message

choose a message to send your members as a text, and we will include a secure link to the stashboard you've created above

Visit Milestone 1

Hey %(MEMBER_FIRST_NAME). This is to let you know that you have achieved a new milestone at %(MERCHANT_DBA) >
https://wininiethepoolat.com/UohoDqOnDod reply STOP to opt out

select mms notification image (recommended)

You're on a Roll!

remove

credit summary

characters 301 , credits 4

done

delete

create audiences with different filters so that you can offer discounts based on things like their average spend

ask for public reviews from members only once they've returned to your store a certain number of times, and not too often, to ensure you request reviews from loyal shoppers at random visit milestones, issue members a small gift. surprise and delight marketing is incredibly powerful

the purpose of this autoconnect is to reward your customers for making a **big purchase**. there is a purchase amount that is so high, that any customer who spends it is immensely **valuable to you**, make sure to capture and entertain those customers by leaving a **big purchase** autoconnect set and ready to delight your largest spenders

some of the most effective campaigns in generating revenue are campaigns that **offer a reward if a certain amount of money is spent**. run these campaigns with ease by creating **big purchase** autoconnects when needed

in this field, you must indicate the **purchase amount (in dollars)** that the customer must make to trigger the big purchase autoconnect

configure autoconnect settings

status

disabled

name (for your reference)

36% off next purchase

big purchase milestone

360

pick audience(s) and create messages for that audience. you can create multiple audiences (i.e. boca and flowers, boca and edibles). for each audience, you can create multiple messages to cycle through (i.e. different message every time receiving 'win back' or 'after visit').
if customers belong to multiple audiences the audience with the highest priority will be applied.

+ audience

audience id: #86778

+ filters

stashboard creator

use the creator below to craft whatever message you want! add text, creative images, and extensions to your campaign and we will generate a stashboard for your members (see tutorial)

HIGH BIG SPENDER! You just spent \$360+ at The Kosher K!!! You defiantly deserve a reward for that! enjoy 36% off your next purchase within the next 18 days!!!! Mazel Tov!

offer

stash wallet

any link

offer type

digital voucher

bonus points

instant points

offer for customer

36% off

offers per customer

1

offer expires after

18

select a notification message

choose a message to send your members as a text, and we will include a secure link to the stashboard you've created above

Big Purchase 1
Hi %(MEMBER_FIRST_NAME)! New notification from %(MERCHANT_DBA) regarding your recent purchase > https://winniehepoolat.com/UohA.MALI2 reply STOP to opt out

select mms notification image (recommended)



remove

credit summary
characters: 300, credits: 4

done

delete

the purpose of this autoconnect is to reward your customers for reaching certain milestones in their **customer lifecycle** at your store. the milestones can be like spending a certain amount within a certain timeframe **from their join date**. this effectively gives you a **lifecycle marketing tool** you can use to steer your members to where you want them to be

in this field, you must indicate the **join date timeframe** that will trigger the autoconnect

we also recommend setting a **specific time** for the message to be sent

you should **set milestones** for what stage your customers should be in in their lifecycle, setting what information you'd like to receive

try adding the **target wallet** extension to the **30, 60, and 90 day milestones** with an incentive tied to it

after setting these up, set up the **desired action taken autoconnects** with a track offer extension to reward them with either bonus points or an offer

configure autoconnect settings

status
disabled

name (for your reference)
15% off for 30/500

days from join
30

time to send
11:00 am

Eastern Time (US & Canada)
currently 01:17pm

pick audience(s) and create messages for that audience. you can create multiple audiences (i.e. boca and flowers, boca and edibles), for each audience, you can create multiple messages to cycle through (i.e. different message every time receiving 'win back' or 'after visit'). if customers belong to multiple audiences the audience with the highest priority will be applied.

+ audience

audience id: #86779

+ filters

stashboard creator

use the creator below to craft whatever message you want! add text, creative images, and extensions to your campaign and we will generate a stashboard for your members (see tutorial)

High again! we have a great offer for you. It's your 30 day anniversary with us at the Koshers K and you've already spent \$500+, that is awesome, for your loyalty enjoy 15% off your next 3 transactions!

track offer target wallet any link

offer type
digital voucher bonus points instant points

offer for customer
15% off

offers per customer
3

offer expires after
180

select a notification message
choose a message to send your members as a text, and we will include a secure link to the stashboard you've created above

select sms notification message

select mms notification image (recommended)

select image

credit summary
characters 201, credits 2

done

delete

chapter 5

reminder autoconnects

the purpose of the **point expiration** autoconnect is to give your members a reminder that they have **unused points that are set to expire** soon. this is a great opportunity to offer a **digital voucher** encouraging them to come in and redeem their unused points

when setting **the days prior to expiration** ensure you are giving your members ample amount of time to come redeem their reward points

use the **substitute value** icon to include the amount of points that will be expiring within the set timeframe

new autoconnect: points expiration

configure autoconnect settings

status
disabled ☐

name (for your reference)
use it before you lose it!

days prior to expiration
15

time to send
11:00 am

Eastern Time (US & Canada)
currently 03:02pm

pick audience(s) and create messages for that audience. you can create multiple audiences (i.e. boca and flowers, boca and edibles). for each audience, you can create multiple messages to cycle through (i.e. different message every time receiving 'win back' or 'after visit').
if customers belong to multiple audiences the audience with the highest priority will be applied.

+ audience

audience id: #86850

+ filters

stashboard creator

use the creator below to craft whatever message you want! add text, creative images, and extensions to your campaign and we will generate a stashboard for your members (see tutorial)

High! this is just a reminder that you have %[EXPIRATION_POINTS] within the next 15 days. Use them before you loose them. Stop by within the next 15days and receive 15% off your purchase.

offer type

digital voucher ☒ bonus points ☐ instant points ☐

offer for customer

15% off purchase

offers per customer

1

offer expires after

15

select a notification message

choose a message to send your members as a text, and we will include a secure link to the stashboard you've created above

Points Expiration
Hi %[MEMBER_FIRST_NAME], your points are about to expire with %[MERCHANT_DBA]. <https://winniethepoolat.com/UoJOEIEBH05> reply STOP to opt out.

select mms notification image (recommended)



remove

credit summary

characters 168, credits 4

done

delete

the purpose of the **med card expiration** autoconnect is to give your members a reminder that their **med card** is going to be expiring soon. this is a great opportunity to offer a **digital voucher** encouraging them to come in and redeem their unused points

when setting up **the days prior to expiration** ensure you are informing your members **at least 30 days** prior to the cards expiration date

use their med card expiration as a way to leverage a **digital voucher** rewarding them for renewing their med card, and to help **offset the price to renew**

configure autoconnect settings

status: disabled

name (for your reference): med card expiration

of days prior to expiration: 30

time to send: 11:00 am

Eastern Time (US & Canada) currently 03:10pm

pick audience(s) and create messages for that audience. you can create multiple audiences (i.e. boca and flowers, boca and edibles). for each audience, you can create multiple messages to cycle through (i.e. different message every time receiving 'win back' or 'alter visit'). if customers belong to multiple audiences the audience with the highest priority will be applied.

audience id: #86852

+ filters

stashboard creator

use the creator below to craft whatever message you want! add text, creative images, and extensions to your campaign and we will generate a stashboard for your members (see tutorial)

High there! We wanted to let you know it's about that time to renew your med card. please ensure you get that renewed to avoid any interruption with obtaining your medicine. Once renewed stop in to The Kosher K and receive a BOGO item of your choice.

offer type: digital voucher, bonus points, instant points

offer for customer: BOGO item

offers per customer: 1

offer expires after: 26

select a notification message

choose a message to send your members as a text, and we will include a secure link to the stashboard you've created above

Medical Card Expiration 1

Hi: %([MEMBER_FIRST_NAME]) you have an important expiration update from %([MERCHANT_DBA]): https://winniethepoolat.com/UqJR4JWrvs8 reply STOP to opt out

select mms notification image (recommended)

It's About That Time

remove

credit summary

characters 370, credits 5

done

delete

ready to get started?

SPRINGBIG