How to Guide

How to create mobile tickets, vouchers and loyalty cards

COSMO
COFFEE HOUSE

Your unique code is:

LCN5C

text local

Contents

Tickets, vouchers and loyalty cards

Mobile tickets, vouchers and loyalty cards

Your Textlocal service gives you the ability to create your own fully branded tickets, vouchers and loyalty cards, and send them out via SMS. They can be sent within outbound text messages or as automatic responses to inbound SMS. Each ticket, voucher or loyalty card contains a unique alphanumeric code, barcode and/or QR code and can be safely stored on the recipient's mobile device and scanned for redemption. You can also create a Wallet version of your ticket, voucher or loyalty card, which recipients can download to their phone and access offline.

What is a ticket?

A mobile ticket gives your customer one-time access to an event, item, reward or activity intended for them only. This could be an ID verification, a click and collect code, an event ticket or an offer linked to a specific customer account.

What is a voucher?

A mobile voucher gives your customer access to a generic event, offer or discount. While the activity is tracked at an individual level, the offer is available to many. Examples might be a discount voucher, free delivery on an order, or a free gift with a qualifying purchase.

What is a loyalty card?

Whereas tickets and vouchers are to be used once only, loyalty cards can be scanned multiple times as your customer builds up their rewards. You can set redemption rules and rewards in the loyalty card, such as – buy 4 coffees get the 5th free.

Why mobile?

More and more consumers are turning to digital tickets, vouchers and loyalty cards. Paper can be lost or misplaced but people always have their phones with them so you can be sure their mobile coupons are available and easy to use.

Keeping it simple

To keep things simple, we refer to this feature in the Textlocal platform as **Ticketing**. This name encompasses tickets, vouchers and loyalty cards. Also, rather than writing out "tickets, vouchers and loyalty cards" every time, sometimes we simply refer to **TVL**.

In a nutshell, how do they work?

1. Create your mobile tickets, vouchers and loyalty cards in your Textlocal account, and add in your own images, branding and content

2. Use our merge fields feature to personalize your messages

3. Include a unique code for each recipient, with an optional barcode or QR Code

4. You can also create a Wallet version so that the recipient can download their TVL to their mobile wallet

5. Select your recipients - you can send your TVL as part of an outbound SMS campaign, or an automated response to inbound text messages.

6. When your customer wants to use their TVL you can redeem it in the Textlocal platform, scan the barcode or QR code using the Textlocal mobile app, or redeem the code using your own systems

Example Uses

Vouchers

Restaurants
'Hi Harish, Get 20% off the next time you dine in with us with this voucher: http://tx.gl/r/TL'

E-commerce
'Happy Birthday! Get 25% off on all apparel today with this exclusive discount voucher: http://tx.gl/r/TL'

Tickets

Tourism
'Hi Neha, Here is the ticket for 4 adults and 2 kids to Ocean World Tour on June 14: http://tx.gl/r/TL. Have fun! '

Event Management
'Hi Ankit, Here's your invite for the Tech Expo 2K15: https://tx.gl/r/TL '

Loyalty cards

Retail
Buy 3 qualifying purchases this month and claim your free gift.

Food & drink
Text COFFEE to 92205 92205 to join our coffee club, and get your 5th coffee free.

Creating your ticket, voucher or loyalty card

In the menu at the top of your screen, select **Ticketing**, then **New Ticket**.

There are 4 steps to creating your TVL; you can track your progress in the ribbon at the top of the screen.

Step 1 Configure your ticket

Give your ticket, voucher or loyalty card a name, then select either a single use or multi-use.
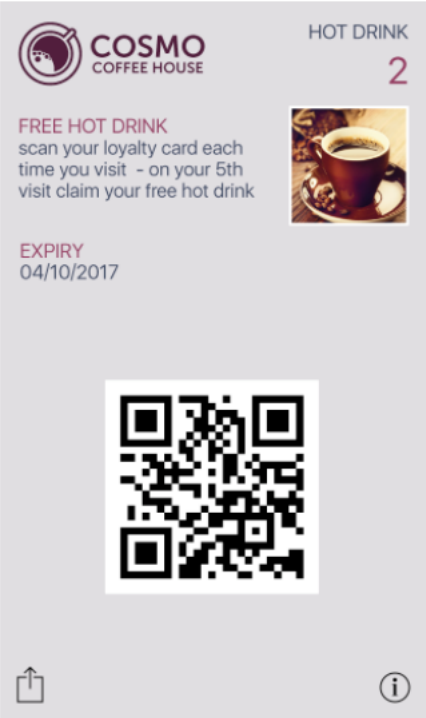
Single use

Select single-use if you want to create a ticket or voucher that can only be redeemed once.

Multi-use

Select multi-use if you want to create a loyalty card that can be redeemed multiple times.

Textlocal Tip
If you've created a single-use ticket or voucher you can only redeem it once. The platform will notify you straight away if another attempt is made.

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HOT DRINK
2

FREE HOT DRINK
scan your loyalty card each time you visit - on your 5th visit claim your free hot drink

EXPIRY
04/10/2017

Ticket type

You can select a ticket for single, or multiple use.

Single use tickets

If you only want your customer to use their ticket once, select this option. Single use tickets can be used when an activity is only available to a specific person, such as event entry or offers linked to a customer's account. They can also be used for general promotions and incentives, which are available to many people.

You will only be able to redeem single-use tickets once per user. You can configure the system to alert you if a second redemption is attempted.

Multiple use tickets

Select multi-use tickets if you want a loyalty card to track repeated use. You can decide how many times the loyalty card can be redeemed, and also configure alerts into the process.

Use the help button to see some examples of how you might use the different types of ticket.

Select your ticket type here

1
Single Use

Or

∞
Multi Use

The next step is to select the recipients for your TVL. You can either send it to an exist contact group in your account, or send it in response to inbound text messages.

About delivery methods

If you are sending your ticket in response to an inbound message, you need an inbox on your account. This inbox will take the name of the keyword you are using, e.g. COFFEE.

When you receive inbound messages, they will be stored in this inbox. This way, you know which people responded to your coffee advert and you can easily contact them as a group in the future.

Select a Group | Or | Respond to Inbound Messages

To send to existing contacts

Select the group you wish to send to.

To respond to inbound messages

Select the inbox you wish to use to receive inbound messages.

Unique codes

When you create a ticket, voucher or loyalty card the system stores a unique code for each recipient. These unique codes are used to track TVL usage and redemption.

You now need to confirm where you want to store these codes.
By default, these codes are assigned to **Custom field 1** in your contact list; you can store them in a different custom field if needed. Just select where you wish to store them and structure your message accordingly.

Store Codes in:

Custom 1 | Custom 2 | Custom 3

Overwrite existing data with code?

Yes | No

⚠ **Warning:** If you are resending a ticket or voucher and want to retain the same codes, choose 'No' here, otherwise your existing codes will be overwritten with new ones.

What are custom fields?

Custom fields store information about each contact, which helps you personalize your texts. You can use different information in custom fields for each contact group or inbox.

In addition to first and last names, you have 3 custom fields available, e.g.

First name	Last name	Custom field 1	Custom field 2	Custom field 3
Ram	Kishore	Mumbai	A free cupcake	January
Amrit	Singh	Delhi	50% off on sandwich	February

Hi **Ram**, visit our **Mumbai** branch to get **a free cupcake** with your coffee in **January**

Hi **Amrit**, visit our **Delhi** branch to get **50% off on sandwich** with your coffee in **February**

Custom fields in TVL

When you create a ticket, voucher or loyalty card, we need to store the codes in one of the custom fields. By default, codes are stored in custom field 1.

For example:

First name	Last name	Custom field 1	Custom field 2	Custom field 3
Ram	Kishore	JAN123	A free cupcake	January

Hi **Ram**, use code **JAN123** in any branch to get **a free cupcake** with your coffee in January

Overwriting existing data

If you have existing data in your specified custom field, you can overwrite it with your TVL codes. This is useful if you want to send more than one offer to the same contact group.

For example, if you want to resend the January offer, then select **Do you want to overwrite existing data? No.** This will resend the existing codes, so (using the example above) Ram will be re-sent his JAN123 code.

If you want to send out a February offer, and replace the existing JAN codes with new FEB codes, select **Do you want to overwrite existing data? Yes,** and Ram will receive a new code, e.g. FEB456.

That's basics configured!

These steps will create up to over 6 million tickets, vouchers or loyalty cards, with unique alphanumeric codes in the format of AB12C.

If you want to change these default settings, select **Advanced Options** where you can:

- Generate more unique TVL codes
- Change the length and format of your codes
- Upload your own unique codes, required.

Advanced options

Format your codes
You can format your codes to be a mix of letters and numbers, up to 12 characters long. You can add your own prefix and suffix, and see how many codes are available in the format you have chosen.

Copy & paste / Upload your own unique code
If you have your own series of codes, you can paste or upload them here.

Check that you are uploading enough codes for your campaign.
If you upload 5,000 codes, and send tickets, vouchers or loyalty cards out to 5,500 users, the system will automatically apply codes in the default format for the extra 500 users.

Step 2 – Design your mobile web page

You can send your ticket code out in a plain text message, or you can create a mobile web page to bring your SMS to life with color & images and generate much more interest in your message.

Your TVL mobile web page can include:

- Unlimited text
- Color, images and logos
- QR code or barcode

    The barcode tool automatically generates Code39 barcodes – if you need a different format, call us and we can help you with this.
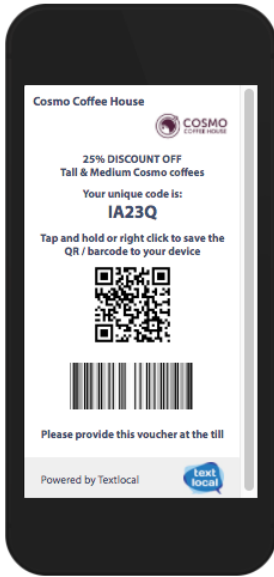
- Wallet download link - you can design your Wallet coupon in Step 3

You can also add in

- Short links
- Merge fields
- Attachments
- Surveys

The left-hand side of your screen will show you a preview of your ticket, voucher or loyalty card. When you are happy with your design, click **Continue.**

Step 3 – Design your Wallet template

If you have chosen to use Wallet you will now be prompted to create a Wallet version of your ticket, voucher or loyalty card. You can either design a new one or use an existing template.

What is Wallet?

Wallet, also sometimes referred to as Passbook, is a way of storing tickets, vouchers and other coupons on a mobile phone. Users can download the Wallet app to their phone (in some cases, it's already installed by the manufacturer) so that all their coupons are in one place.

Why include a Wallet version?

- Customers can save the ticket or voucher to their phone for a later date and don't have to search through their text messages to find their ticket, voucher and loyalty card.
- Tickets, vouchers and loyalty cards stored in Wallet apps can be accessed offline.
- More and more consumers are starting to use, and interact more with Wallets.

Please note: Wallet designs must follow guidelines created by Apple and other phone manufacturers. This means your Wallet ticket, voucher or loyalty card may not look exactly like the original one you have created.

In your Wallet design you can:

- Choose your background and font Colors
- Add your logo
- Choose your TVL content
- Insert merge fields
- Save Wallet templates for future use
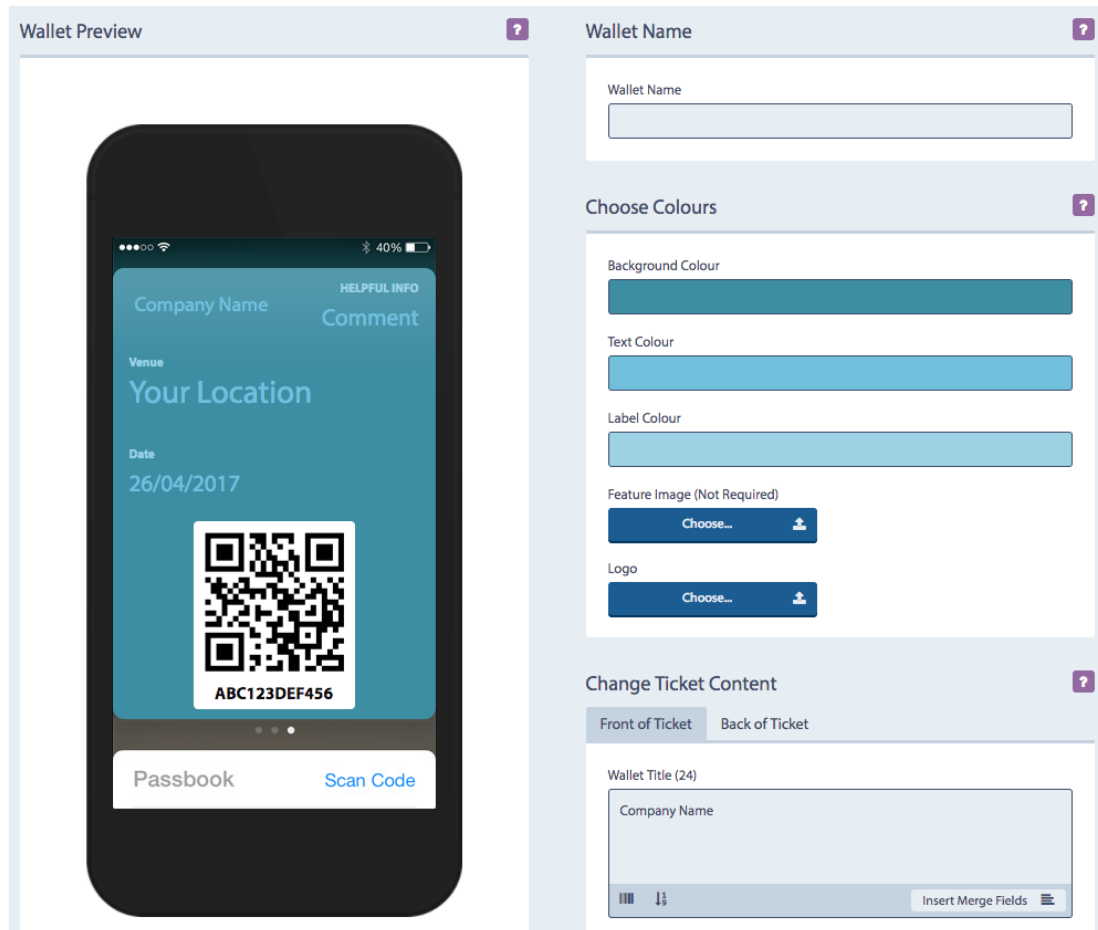
You can use the **Wallet Preview** feature to see your Wallet design; when you are happy, click **Continue**.

Step 4 – Notifications, rules and rewards

You can set up notifications, rules and rewards that are triggered when the ticket, voucher or loyalty card is redeemed. This is an optional feature; to move past this section simply click Continue.

The set-up is slightly different for single-use tickets and vouchers, and multi-use loyalty cards.

Set an expiry date and message
## (for tickets, vouchers and loyalty cards)

If your ticket, voucher or loyalty card is time-bound you can set an expiry date and message. This works well if you plan to send your TVL as part of an auto-response, in case customers text in after the offer has expired.

We're sorry, but this offer expired on September 30th. Please keep your eye out for our upcoming special offers!

Expiry Date	Expiry Message
2017/09/30 00:15	We're sorry, but this offer expired on September 30th. Please keep your eye out for our upcoming special offers!
(Leave blank if you do not have an Expiry Date)	

Add notifications (for single-use tickets and vouchers)

Click on **Add Additional Notification**, and select whether to configure a **Display Message, Send an SMS, Send an Email** or **Call a URL**.
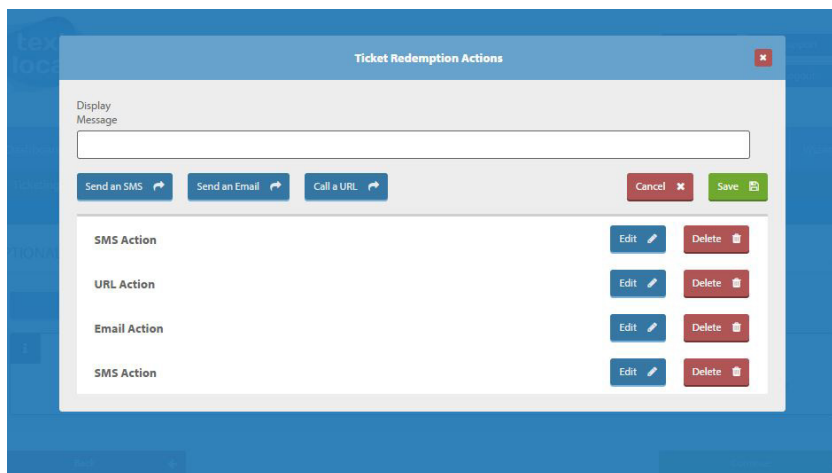
The message you put in the **Display Message** field will show in the Textlocal platform when you redeem the TVL; the customer will not see this.

Use the **Edit** buttons to configure the details of your SMS, Email and Url actions. You can set up multiple actions, which will be triggered when the customer redeems their TVL.

SMS actions

You can configure your redemption SMS in several ways:

- Send an SMS to the TVL holder, or other specified recipients
- Send an SMS to a contact group in your account
- Select your sender name
- Add attachments, mobile web pages, links or surveys in your SMS
- Use merge fields to add personalization to your redemption SMS
- Send the message immediately or schedule it for the future
- Send information about the redemption to a different system, via a url call

Email actions

Your redemption emails can include:

- To / From / cc / bcc fields
- Email subject
- Email body text
- Attachment
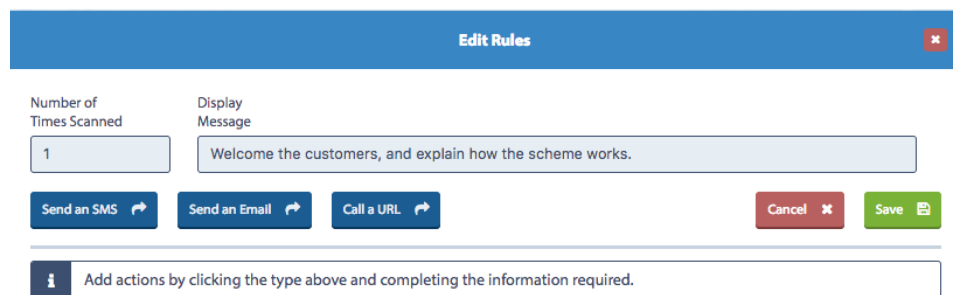- Information about the redemption

URL Actions
You can send information about the redemption to a different system, via a url call.
When you have added in all your actions, click **Save.**

Rules and rewards for multi-use loyalty cards

When you send a multi-use loyalty card you can add different notifications each time the card is scanned. These are the rules and rewards for your loyalty scheme.

Click on Add Rules/Rewards.

The message you put in the **Display message** field will show in the Textlocal platform; the customer will not see this. You can configure a different display message each time the loyalty card is scanned.

For example, if you are offering the 5th coffee free, your display messages could be:

On scan 1: Welcome the customer to the loyalty scheme & explain how it works.

On scan 4: Remind the customer they can claim their free drink on their next visit.

SMS, Email and Url actions

These customer-facing messages are the same as the SMS, Email and Url actions for single-use tickets and vouchers, but with the ability to send a different message each time the loyalty card is scanned. This can help you keep track of redemptions, and encourage the customer to earn their reward. You could send SMS:

On scan 1: Thanks, you've had your first coffee, keep coming back and you'll soon have earned your free one.

On scan 3: You're well on your way to your free coffee! Just one more purchase to go.

On scan 4: Congratulations, your next coffee's on us! Show your loyalty card on your next visit to claim your drink.

Repeat Actions

If you want to reset and repeat your actions, choose this option. With repeat actions, when the customer has reached their target (e.g. claimed their free coffee), their scan count will reset to zero and they can start collecting points again.

When you have configured your notifications, rules and rewards for your ticket, voucher or loyalty card, click on **Continue** to schedule your send.

Step 5 - Sending your ticket or voucher

In this step, you can configure your send, or save your TVL.

Send later

If you click **Send Later,** your ticket, voucher or loyalty card will be saved to send later. You can access the TVL by clicking **Ticketing** on the top ribbon, then going to **Your Vouchers & Tickets.**

Send to a group

If, in Step 1, you opted to **Send to existing contacts**, click on **Send to a Group.** You will be taken to the Send a Text Message page, where the Message box is pre-populated with the link to your TVL. Write your message around this link, using Merge Fields, attachments and other tools as required.
You can send your message immediately, or schedule it for a later date.

Respond to inbound messages

If, in Step 1, you opted to **respond to inbound messages** you now need to configure the automated response in which the ticket or voucher will be sent. Click on **Configure Now.**
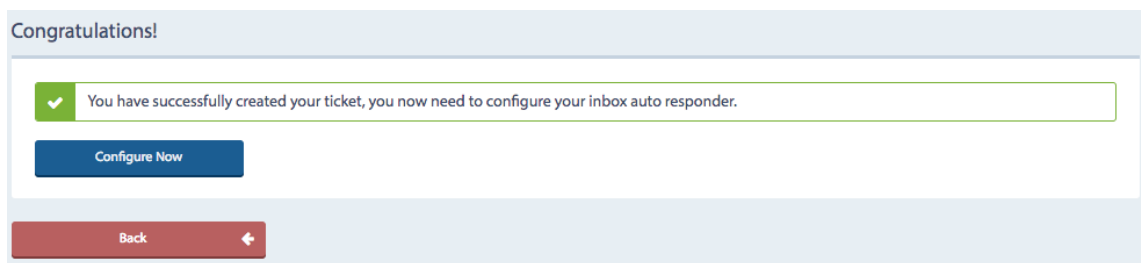
The Message box will be pre-populated with the link to your TVL.

You can then write your message around this link, and configure the auto-responses to the inbound texts you receive.
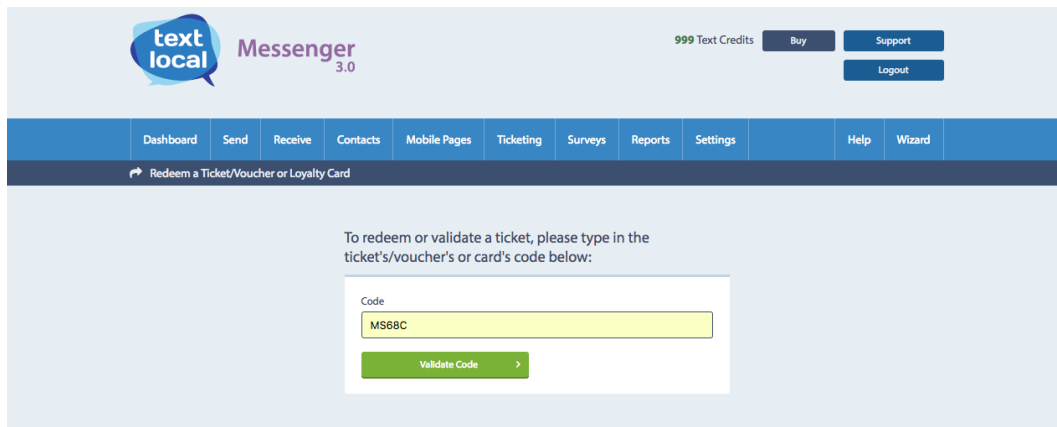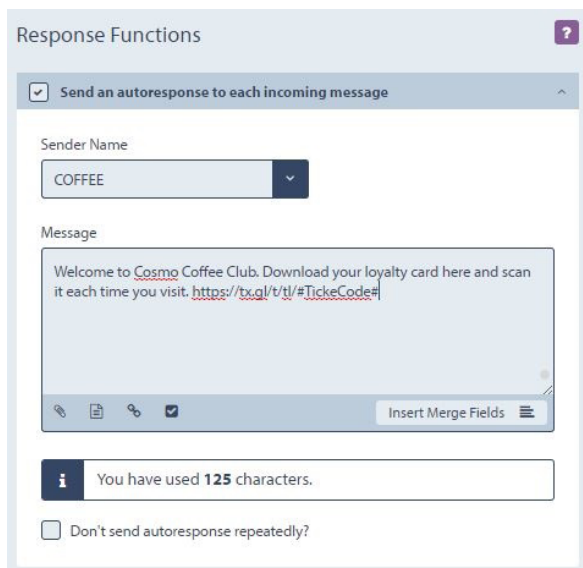
Redeeming your ticket, voucher and loyalty cards

You can redeem tickets, vouchers and loyalty cards by:

- Manually entering the code in the Textlocal platform
- Using the Textlocal mobile app
- Scanning or entering the code in your EPOS or other system

Redeeming in the Textlocal platform

In the **Tickets** menu option, select **Redeem** and then enter the unique ticket code.
The screen will display any messages you've included to be shown at this point, as well as details about the scan and the customer.

Redeeming in the Textlocal mobile app

If you use the mobile app to redeem, you can either scan the QR code and/or barcode on the ticket or voucher or enter the code manually. If you've set up a display message for this scan, this will pop up on your phone now. As well as this, the app will confirm that the ticket or voucher was scanned successfully.

Redeeming in your own system

If you'd like to redeem tickets and vouchers through your own platforms, please get in touch and we can help you set this up.

Textlocal Tip

If the TVL code is invalid, an error message will occur, so you can be sure you're only giving rewards to valid customers

Reporting

In Messenger, you can see reports on your ticket and voucher scans. The codes will be grouped together showing the most recent scan first. You can also search for codes that have been scanned and specify a date range in which to search.

You can export the data for further analysis if required. This data will include the time & date of the most recent validation. You can also export nonredeemers, so you can target these people individually. For example: ***'#FirstName# you haven't claimed your free delivery yet. Click here to get your unique code.***

Managing your opt-outs

We strongly advise including an opt-out message on all outbound texts, e.g. 'text STOP to 56263'. Messenger has inbuilt functionality which automatically removes any mobile numbers which have opted-out from your contact list, so you don't have to do anything. This gives peace of mind, knowing that you can't send a message to someone who has opted-out.

By ticking one box, Messenger will add an 'opt-out' path to your messages. This gives a simple instruction to the recipient on what to do if they would like to remove themselves from your contact list, so they no longer receive any messages from you. The number will stay on the opt-out list until the owner chooses to opt back in.

Messenger will cleanse the contacts you upload, stripping out any numbers which have previously opted-out of your messages. You can also manually add opt-out contact numbers to the list – perfect if a customer contacts you directly with an opt-out request.

Your data is safe with Textlocal

We understand how important your contact data is to you and to your business. At Textlocal, we comply in the way we handle all consumer data. We will not pass on any of your data to any third parties, keeping it confidential and secure.

For further information, please view our Privacy Policy

Need more help?

If you need any further help or guidance using Messenger please contact our dedicated support team on +91 40 30858602 or support@textlocal.in or visit our website www.textlocal.in for more help and support.

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