Targ8Connect / T8Connect

This is the portal for Targ8 which will be used for the following:"

- Campaign Management
- Operations CRM
- Campaign Delivery
- Invoicing/Campaign status
- LIVE campaign monitoring
- RFP tracking and evaluation

Customer Login

- User Name
- Password
- Company/Client Code (Code generated by Targ8 during onboarding/setup) eg.: Acme Tech Media – ATMT8003 / ATMDBI003 (We could also generate random alphanumeric codes, ensuring that the client company name is hidden and private).
- Multiple User ID generation for a Company
    - Reset/Forgot Password (Auto Reset Password)
- Customer/Client should be able to change/reset/update password at any given point of time.
- Any reset requests will be handled by us (ADMIN).
- CAPTCHA need for authentication during Login/Update/Reset etc.
- Auto-Logout options to be provided
    - By default, 30 minutes. Customer should have options to change it to 5, 10, 15, 30, 1 hour.
- Process of Reset etc. should be fully automated, instant & seamless and customer should get an email confirming the same and a copy/ticket should come to us (ADMIN). This also includes Forgot Password request, Add User, Modify/Delete User requests generated by Client.

Process:

Once client is onboarded and all joining formalities, NDA, other Agreements etc. are signed, we will send a welcome email asking for the following:

- Number of Users
- Name, Designation and Email address
- Role – (see below)

ADMIN will create login credentials for the number of users and create Usernames and Passwords accordingly.

These details will be sent to the requisite parties with a welcome email.

During the first login by User, they should receive a prompt to change the password. CAPTCHA needs to be included on all login/Update Password attempts.

Any update to login credential should be followed up instantly with a system generated acknowledgment email sent to the recipient and another to ADMIN.

We will start this portal as a web interface and will aim for mobile interface at a later stage.

Multiple logins can be provided with roles as assigned by Campaign Owner (Client).

Here are the Roles:

- Campaign Owner (Full Access, Upload, Download, Modify Project, Add User, Delete User)
- View Only (User will only be able to view Campaign details)
- Upload Only (User will only be able to Upload any documents/project details)
- Download Only (User will only be able to download files – eg. Delivery files, Invoices, etc.

** **NOTE:** Any/all activity should have an automated email sent to the requisite parties and ADMIN.
We (ADMIN) should be able to track and receive notifications on all activities – Viewed, Downloaded, Updated, Modified, Comments, Ticket Raised etc.

Customer Portal

Here are the Categories:

- ✓ Campaign Management
- ✓ RFP
- ✓ Invoicing/Billing
- ✓ Month/Year-wise visibility of all campaigns, RFPs, Invoices etc. at any point of time.
- ✓ Tech Support – This will be used by User to create any Tickets which will need to be addressed by IT with a Unique Ticketing number and email notifications of status (Open, Pending, Resolved).

During client onboarding process, we will check with Client on requisite roles of Users and will add them accordingly.

We can decide if we can give access to Campaign Owners to Add Users OR raise a request and we (ADMIN) will get it done at the backend. This will let us be in full control and avoid any errors.

If Campaign owner sends a request, we should be able to do that and a system generated email will be sent to the requestor and a copy to requestee (ADMIN/IT).

RFP Management

- RFP Name

- Campaign Specs – We will keep this as an open text box, as we do not want client to add to select from drop-downs as it is time consuming. Usually, they just paste the specifications and they should be able to do that easily in the text box.

- We will provide attachment options, wherein they can attach documents (Word, Excel, CSV etc.) with campaign specs

- Attachments: ABM, Suppression lists, Exclusion lists, DNC, and any other documents.

- Comments Box – Open Text box for any comments which can be added manually.

- Project Timeframe – Drop-down with START (Month/Year) – END (Month/Year)

- Target CPL – Option to enter target CPL, which we can try to match. Drop-down with USD, GBP, EUR. If we can add all currencies in the drop-down, it will be great.

- RFP – OPEN – CLOSED – WIN/LOSS

- Once customer updates the above, we will move it to Campaign Management Section. Eventually, we will plan to get this process automated.

- Upcoming Projects – This will reflect in Campaign Management section, under Upcoming Projects section with Status showing as Pending. *This visibility will help in follow-ups and tracking of RFPs.*

- All RFPs received will always be available for view to check WIN/LOSS ratio and conversion. *This will also help in analysis during monthly/quarterly planning with customers and in identifying reasons for fallouts.*

NOTE:

- All data should be always available for View & Download in CSV/Excel format.
- Categorization month, quarter and year-wise

Campaign Management

- Roles will be assigned to Client Team Member as per update by Campaign Owner
- RFP Wins will directly show under Campaigns; however, they will reflect PENDING status till they are confirmed to go LIVE.
- For any campaigns which are received directly and not through RFP process will be added by Campaign Owner/ADMIN in Campaign Management section.

PORTAL Sections:

- Client Code (Code Assigned to Client)
- Campaign Name (Campaign Name)
- Campaign Code (Campaign Code)
- Flight Details
- Lead Volume
- Start Date
- End Date
- Pacing – Weekly, bi-weekly, etc.
- Delivery Day
- Job Title

- Job Role
- Geography
- Industry
- Company Size
- Revenue Size
- Tactics – Digital / TM / Hybrid
- Specifications –
    - ABM (Y/N) + Attachment option
    - Suppression (Y/N) + Attachment option
    - Exclusion (Y/N) + Attachment option
    - Script (Y/N) + Attachment option
    - Lead Delivery Template (Y/N) + Attachment option

**** Note:**

- All these options should have open text box and N/A option. If any field is not entered, we should still be able to save it and all other non-entry sections should be marked as N/A.

- There should be a free text column where clients can add URLs containing ABMs, Exclusion lists etc. if applicable.

- Special Instructions – Free text box

- We can add a section for Campaign Manager Name, if we're working with multiple users from the same company.

- All campaign details should be made available with a single click option to be downloaded as a document.

- Any attachments should be mentioned as a URL which drives to Targ8Connect to download. Only registered users will be able to download any files – if they are added by ADMIN and provided with credentials.

- A clickable button to go to Campaign LIVE Dashboard to monitor the campaign.

LIVE Campaign Dashboard

- Client Code
- Campaign Name
- Campaign Code
- Campaign Owner
- Campaign Status: **LIVE**, **PAUSED**, **COMPLETED**
- Start Date
- End Date
- Lead Volume – Number of leads (Total leads booked)
- Leads Scored – Approx. number of leads scored (These are not qualified yet but QA pending)
- Leads under Audit – Leads getting audited by QA

- Leads ready for delivery – Post QA leads, which are approved by QA and ready to be delivered
- Delivered – Approved leads sent for delivery or available for download (CSV/Excel)
- Rejects – Rejects received from client (This should adjust the balances accordingly)
- Balance – Balance of leads, which includes adjustments after rejects (if any)

- Once leads are delivered Campaign Status will be marked as COMPLETED
- Button to go to Campaign Specifications to View/Modify. Only Users assigned with Modify will be able to modify campaign specs, rest should be only be able to view.
- CPL/CPM
- Billable leads
- Billable Amount
- Button to send request for invoicing – An email will be sent to Accounts team at Targ8, including ADMIN.

Targ8Connect Internal Roles

Phase 1

- Master ADMIN Role – GM, MF, IT (As assigned)
  - Full Access
  - Add Users
  - Assign Roles
  - Modify
  - Delete

Phase 2

- Create Login and give access to Operations
  - Operations will not have access to Modify or Delete
  - Access only to Campaign Specifications
  - No access to Client Dashboard, Client Code or any other Confidential Information including CPL, Billing, Campaign Status etc.
  - Access only to Campaign details
  - Single login will be provided campaign-wise, as there may be multiple users from Ops. (*We can decide later if we are able to create multiple sub-users for Ops.)*
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