REC Samurai Release (2.8.4 & 2.8.5)

Version Released 6th June 2012

Key Benefits Summary

This release contains several major new features including:

Re-ordering email reminders to drive repeat sales*

Product Review email reminders to create more sales via "social shopping" *

User Signup followup emails*

Referral scheme introduction and improved tracking to drive more affiliate tracking**

Store Locator to promote multi-channel retailing for bricks-and-clicks retailers

New Delivery option to charge by category (e.g. chilled or non-chilled foods)

Page Privacy Settings via user group permissions

ROI tracking improvements – see which marketing spend delivers best results

Email Marketing – user targeting improvements – filter by groups

Automatic Wishlist handling option added

Tag Walls - Add to pages to improve SEO

Batch Add Product Associations – save time using this new batch facility

Form Builder Enhancements – AJAX Transition Features

Session handling improvements to cater for users with cookies turned off

EU Cookie Law compliance***

*via Email Tasks
**via Affiliate Marketing module – requires Licence Upgrade
***via Javascript insertion and Page Manager – details already provided via email.

1. Email Tasks – NEW

Highlighted Benefits:

Set up Product Re-ordering email reminders

Set up Product Review email reminders

Create Signup followup emails

Overview

Email Tasks allows you to send out scheduled emails with tailored content in intervals from as little as 1 hour to a specified number of days hence. This is triggered by events such as users signing up on the site (including product purchase signups, newsletters and forms) or users placing an order. When either of these happens a followup email is added to the schedule and sent out at the specified time, containing text tailored via Page Manager.

This can be used to prompt for product re-ordering, product review reminders and creating your own "slippery slope" followups after someone signs up.

Product Re-ordering Set Up Instructions

Access Email Tasks > Add Task.

Main Details Section

Event name: Order Refill Reminder
Event: New Order

Email To Send Section *(customise entries as appropriate, examples shown)*

Email Subject Name: Don't Forget To Fill Up Again
Page Content: Email Order Refill Reminder 1

Select the page you wish to send as the email content. You will need to have previously set this page up via Page Manager. You can use Page Tags to personalise the email as shown below.

Page Tags

The new tags available to use in the page are:

{order_id}	Order ID
{order_date}	Order Date
{order_quantity}	Order Quantity
{order_price}	Order Total Price/Cost
{products_bought}	Table Of Products Bought And Review Links
{reorder_items}	Re-order the items on this order via a **Re-order Now** link

Example Order Refill Page

Dear {first_name},

It's been a week since you placed your last order with us and we thought you might be getting low, so rather than let you run out we thought it would be helpful to send a reminder.

Your last order number was [order_id] and these are the products you bought:

{products_bought}

To help, you can easily re-order the same products and quantities as last time by clicking {re-order_items}

If there's anything else you need then get in touch with the team, we're always happy to help.

{company_name}

{company_slogan}

{company_telephone}

Hint: Add other promotional lines to the email to help your cross- and up-sell activities.

Time Delay Section *(customise entries as appropriate, examples shown)*

Days: 7
Hours: 0
Replace: Tick to only use the newest event and replace any already in the schedule.

By ticking the Replace box, you get rid of any previous reminders that are made redundant because the user has re-ordered on their own initiative before they received the scheduled reminder.

Maximise Re-purchasing With Multiple Followup Emails

You can set up further emails to prompt the user to re-purchase from you by adding other email task(s) with a greater length of days or hours. For example, if the first task is set with **Days** set to ***7***, you could add another with **Days** set to ***10*** and this time offer a discount in your page content (by setting up a new page with the discount code entered into it).

Product Review Set Up Instructions

Access Email Tasks > Add Task.

Main Details Section

Event name: Product Review
Event: New Order

Email To Send Section *(customise entries as appropriate, examples shown)*

Email Subject Name: What Did You Think Of Your Product? Add A Review
Page Content: Product Review

Select the page you wish to send as the email content. You will need to have previously set this page up via Page Manager. You can use Page Tags to personalise the email as shown below.

Product Review Page Tags

If you are sending out Product Reviews, you will need to ensure you set up your page so that it pulls in the product order lines together with a button to leave a review against each line.

The new tags available to use in the page are:

{order_id}	Order ID
{order_date}	Order Date
{order_quantity}	Order Qty
{order_price}	Order Total Price/Cost
{products_bought}	Table Of Products Bought And Review Links
{reorder_items}	Re-order the items on this order via a **Re-order Now** link

Example Product Review Page

Dear {first_name},

Thank you for your recent purchase with us on {order_date}.

We invite you to submit a review for the product you purchased which would benefit other customers when they are looking to buy this product.

It's easy to place a review, just click the review button next to the button.

{products_bought}

If you need anything further then get in touch, we'll be happy to help.

{company_name}

{company_slogan}

{company_telephone}

Hint: Add other promotional lines to the email to help your cross- and up-sell activities, or incentives if the user leaves a review.

Time Delay Section *(customise entries as appropriate, examples shown)*

Days: 3
Hours: 0
Replace: Leave this unticked.

By unticking the Replace box, you retain any previous reminders that are scheduled to be sent as you will want to send out a reminder to get your product reviews for each and every order that has been placed by the user.

Encourage Product Reviews With Multiple Followup Emails

You can set up further emails to prompt the user to leave a product review by adding other email task(s) with a greater length of days or hours. For example, if the first task is set with **Days** set to ***3***, you could add another with **Days** set to ***7*** and this time offer an incentive in your page content (by setting up a new page with the discount code entered into it).

We recommend you only send 1 or 2 product review emails otherwise you run the risk of being seen as a spammy business.

User Signup Followup Set Up Instructions

This allows automated email followup once a user signs up to any part of the site (including placing an ecommerce order or being added via Admin) and could be used in conjunction with Damascus' Form Builder to add an extra level of automation to your sales funnel process.

This could also be used by sites who want to send a string of emails to a newly registered user without Form Builder, for example, an email-a-day explaining a program in 7 stages such as “A Secret A Day For Selling Success”.

Important Note About Site Registration:

Whenever someone registers on the site, as default they are sent an email with their login details which uses content contained in the System Page called Email New Reg. Email Tasks is used to provide an automated set of emails thereafter.

Users who are added via Admin do not receive the Email New Reg notification, but they will receive any emails set up via Email Tasks.

Access Email Tasks > Add Task.

Main Details Section

Event name: New User Followup
Event: New User

Email To Send Section *(customise entries as appropriate, examples shown)*

Email Subject Name: Your Route To Success – Day 1!
Page Content: New User Email 1 of 7

Select the page you wish to send as the email content. You will need to have previously set this page up via Page Manager. You can use Page Tags to personalise the email as shown below.

New User Page Tags

The tags available to use in the page are:

{first_name}	User's first name
{last_name}	User's surname
{user_town}	User's town
{display_name}	User's display name

Example Signup Followup Page

Dear {first_name},

This is the first of your 7 daily emails explaining how to achieve your route to success...

…
…
…
…

If you need anything further then get in touch, we'll be happy to help.

{company_name}

{company_slogan}

{company_telephone}

Hint: Add other promotional lines to the email to help your cross- and upsell

Time Delay Section *(customise entries as appropriate, examples shown)*

Days: 0
Hours: 1
Replace: Leave this unticked.

It doesn't matter whether the Replace box is ticked or unticked as the user can only sign up with their email address once.

Creating Your Sales Funnel With Multiple Followup Emails

You can set up further emails to inform the user or encourage them to buy into your programs by adding other email task(s) with a greater length of days or hours. Once your cycle has been completed, then we recommend sending further emails using the User Group functionality in Email Manager.

2. Referral Scheme – NEW

Highlighted Benefits:

Encourage Sales Via Referrers (e.g. Retailers, Party Planners etc)

Create Cross-over Marketing For Both Online & Offline

Create Tracking Via Coupon Distribution To End-Customers & Redemption Online

Allow “Affiliate-For-Life” Tracking To Highly Incentivise Referrers

Track Referrer-Driven Sales Via Affiliate Reports

Easily Pay Referrers Via Individual Affiliate Report

Display Monies Accrued / Paid To Referrers Via Their Own Account Login

Overview

The system currently allows you to track sales from ***affiliates*** through the issuance of affiliate codes which they then put into links on their own promotional websites and receive a commission when a purchase is made via a user clicking on that link.

The ***Referral Scheme*** now adds the ability to distribute coupons to end-customers via “referrers”, with the end-customer receiving a discount for buying the product online via the coupon and the referrer receiving a percentage commission as well.

This gives you the opportunity to extend your marketing into the offline world via printed coupons which can be distributed via a number of channels, whilst also extending your online marketing potential and encouraging people to buy online. This is known as ***cross-over marketing*** and examples are given on the table below.

To highly incentivise all referrers, you can set the system so that the referrer will continue to receive a commission every time the customer they introduced goes on to make further purchases, with or without entering the original coupon code. This is called “Affiliate-For-Life” tracking because it ties that customer to the referrer forever.

You can also create a ***repeat buying pattern*** for the end-customers to keep the sales momentum going by setting up the coupon for 2 or more uses. You can also set up ***Email Tasks*** to remind the user to come back to the site to shop, as well as sending them regular newsletters via ***Email Manager***.

The system is easily administered via affiliate reports, which also enable you to mark the commission payment has been made, with the affiliate/referrer being able to view their accrued/paid commission via their account page on the site.

Example Uses Of Affiliates / Referrers	***Online / Offline***
Retailers selling your product in their stores	Offline
Party Planners selling your products	Offline
Clubs, interest groups, charities, service providers and other relevant organisations	Both
Family and friends referrals	Offline
News and magazine sites promoting / recommending your products	Both
Bloggers recommending your products	Online
Forum owners allowing you to post into the forum or place banner adverts for free/discounted rates	Online
Recommendation websites	Online
Facebook or Twitter “power users” with a large fan base	Online
Directly-owned affiliate mini marketing sites (MMS) available within the system already	Online
External affiliate sites	Online

Setting Up The Referral Scheme

<u>1. Affiliate For Life Setting</u>

In ***Site Settings > Display Elements*** tick ***Affiliate For Life*** if you want to assign all subsequent orders to the affiliate from which they first originated.

This will highly incentivise the referrer to find further customers because you will pay them on all repeat orders from the customer they first introduced to you.

Also check the following setting is set the way you want it to work:

If using affiliates, should their earnings be calculated with delivery added? Untick to exclude delivery.

<u>2. Referrer Set Up</u>

Add the referrer via **Add User**, then via **All Users** edit the user's **Affiliate Data** :

Is this user an affiliate? Tick this box

If so, add a percentage for them here: [enter the percentage without the % sign]

Membership Code / Affiliate Code: [add the name of the referrer which will also appear on the coupons that are to be distributed by the referrer]

Click **Update Any Changes**

Hint: Change the membership code to an easy to remember name such as the business name, for example DANEMERE

3. Coupon Setup

Via **Add Coupon** set up the coupon to be used by this referrer. You will need to set up a separate coupon for each referrer you are taking on.

Hint: Set the number of ***Uses per user*** to 2 or more to create a repeat buying pattern.

Important: Change The Coupon Code! Make sure you change the automatically generated coupon code to be the same as the name entered in the ***Membership Code / Affiliate Code*** field when you set up the referrer as a user. Click on ***Enter Your Own Code Instead*** and put in the same name entered on the user record ***Membership Code / Affiliate Code***.

Via **Assign Coupons** select the new coupon and assign it to **ALL** users so anyone can use it. Optionally, set the other columns if you want to restrict the coupon to category, manufacturer/brand or a single product. Once finished click **Add New Assignment.**

The coupon is now set up and can be distributed to the referrer with the relevant terms you have set up for its usage.

Affiliate Reporting & Marking Commission Payments

There are two reports which provide affiliate / referral information and the ability to mark commission as paid:

1. Affiliates Order Summary Report

This shows a summary of the activity of all affiliates in a list format. You do not have the option to mark paym

2. Individual Affiliate Orders Report & Payment **- NEW**

This report allows you to select an individual affiliate to view all of their associated orders and commission due, paid and when paid.

You can also mark which outstanding commission payments you wish to pay and batch process them to save time.

You need to organise the actual payment to the affiliate outside of the system. For example, if you send them a cheque you could enclose a printed copy of this report.

3. Order Manager – Affiliate Tracking Message

In Order Manager, you will be able to see if an order has originated from an affiliate in the **Source** column which will also display which affiliate it came from when you hover over the icon and will take you to the affiliate's page when you click it.
On the actual order itself, a message appears in the header showing the affiliate commission details for the order and whether it has been paid via a tickbox.

You can mark or unmark the commission as paid via this tickbox.

Affiliate "Self Service"

Affiliates can login to their account and click **Affiliate Scheme Details** in the **Quick Links** menu to view their summarised commission position.

3. Store Locator – NEW

Increase your crossover marketing by adding a map and automatic directions to your website showing where your stores are located.

Go to **Store Locator** in the **Shop Admin** section and add your store details, ensuring you fill in your postcode as this is used to put your store on the Google-powered map.

Back-to-Back Purchase Order Fulfilment

If you are placing back-to-back orders with suppliers for fulfilment, you can also select which store they need to send the products to. In **Order Manager** select the relevant order then, in the **Purchase Order** section in the **Send Products To** field, select the store where the products should be sent to by the supplier and click **Create Purchase Order**.

4. Delivery Charge Uplift By Category – NEW

You can now add an extra delivery charge uplift to an overall order if the product(s) on the order are within a specified category. This is useful for instances such as chilled and non-chilled foods, where the cost of delivering chilled food is higher because a refrigerated van is used.

> ***Hint:*** You can place the product into a 2^{nd} category and use this to trigger the uplift if you do not want to change your existing category structure.

5. Page Privacy Settings - NEW

You can now set <u>content</u> pages so that only users who have permissions to view the page can do so. Note: This does not apply to <u>product</u> pages.

Select the page you want to add permissions to via **Page Manager.**

In the new **Access Control** section, select whether users have to be logged in or not to view a page and whether they need to belong to specified groups or combinations of groups.

If the user does not satisfy the permissions level you have set then they will not see the page on the website at all, not even in navigation.

6. ROI & Tracking Improvements – Marketing Console

Marketing Console has undergone a significant update. You can now access the following tabbed information:

Google Results

Add your keyword and URL combinations to monitor your progress and that of your competitors

Revenue Sources

You can use this revenue source information to improve your marketing returns.

The sources shown are:

F	**F**acebook	O	Google **O**rganic
T	**T**witter	D	**D**irect Traffic
S	Google **S**hopping	Coins	Affiliates
A	Google **A**dwords		

> **Hint:** You can also more easily see the source of sales in **Order Manager** via the **Source** column.

Marketing Log

Add your marketing activities so you can keep track of all actions you have taken and see these overlaid as milestone lines on the other tabbed graphs so you can correlate results to positive actions.

Domain Authority

Domain Authority represents a prediction of how a website will perform in search engine rankings. Use Domain Authority when comparing your site to that of the competition, or for tracking the "strength" of your website over time.

Link Rank

Link Rank is a link popularity score. It reflects the importance of any given web page in relation to the internet as a whole. It is measured on a 0-10 score. The amount of quality links pointing to your site remains the most important ranking factor in the Google Algorithm.

> **Hint**: Why not add your competitors URL's alongside your own to see how you measure up and uncover why other websites may be outperforming you in Google.

SEO Report

This will produce a SEO report of a page, based on the keyword you input. Following the best practice recommendations within this report will ensure your page is optimised for a high position in the search engines for that keyword.

Run Now Button

You can now refresh the results in Marketing Console by clicking the **Run Now** button to bring the results fully up to date for the month and have them emailed to the site admin.

7. Email Marketing – User Targeting Improvements

In **Email Manager** you can now filter users so that emails will only go to those users who exist in all the required categories, as well as giving the option to send to all users, specified email addresses or named users.

This gives you greater flexibility in targeting users by different groups.

For example:

Group 1 could be sales type such as Prospect, Customer
Group 2 could be turnover levels such as £100k, £250k, £1m …
Group 3 could be regions such as Uk, US, Australia …

You could then send a targeted email to all prospects with a £1m turnover in Australia.

Hint: You could use Damascus Form Builder to engage with website visitors so they offer you this information via a data capture form.

8. Wishlists Improvements

You can now opt to remove purchased items off a wish list to avoid more than one person buying the same product.

In Site Setup > Products & Store Pages Setup:

Auto remove wishlist items when someone buys one after clicking on it.

Tick to turn this feature on, else leave blank.

9. Add Tag Walls To Pages

You now have the ability to add tag walls to specific pages either as a main body app or a sidebar app. This will build up a tag wall on the page based on user visits and increase your user-generated “keyword spread” to help you get indexed more widely in search engines.

Via **Page Manager**, simply add the **Page Tag Wall** app to the selected page as either a **Main Body App** or **Sidebar App**.

10. Batch Add Product Associations

You can now save time when adding a multiple product associations across similar products by going to **Batch Add Product Associations** and selecting which products you want to associate via a list, with the options to set them as related or alternatives and whether to reverse copy the association.

11. Form Builder Enhancements – AJAX Transition Features

Display Improvements

AJAX provides a smoother transition once you have submitted a form, giving you the ability to display message text in popup windows, or another page's content in a modal popup window or to replace a form with slide-in content from another page.

You now have AJAX features in Form Builder to improve the user experience for displaying messages and content.

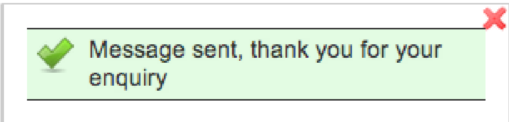
1. AJAX Message On Form Submit (e.g. "Thank You Message")

You can display a message on a successfully submitted form using the following fields in the M**ain Details** of the form:

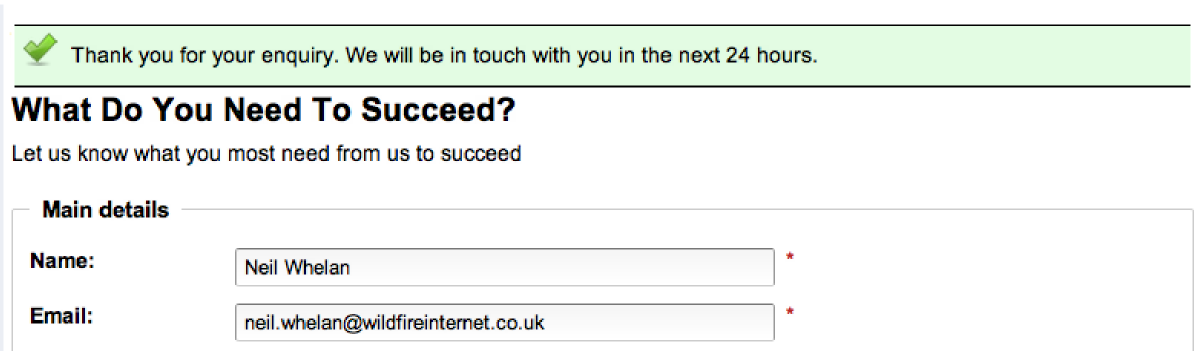
Ajax Submission – Tick to submit the form using AJAX

Ajax Success Text – This is the text that will be displayed via AJAX once the form has been successfully submitted e.g. "Message sent, thank you for your enquiry"

Standard Thank You Message (non-AJAX)

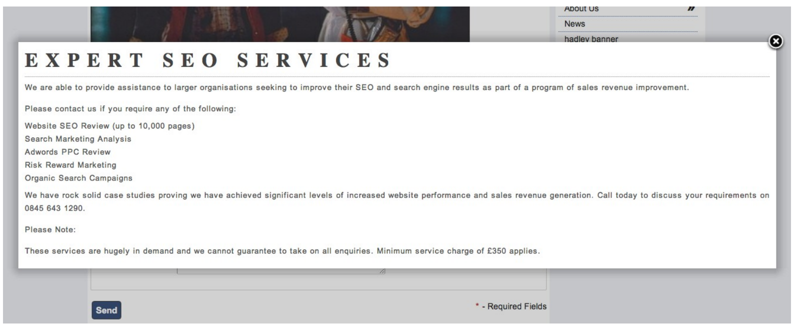


Example AJAX Message



2. Adding A Modal Popup Window

Once you have submitted a form, you can display another page's content via a modal popup, as show in the example below:



To create this effect:

In **Logic Filter > Add Process**

Select **Action**: Ajax Response Page Text

In **Page:** [select page to be displayed upon successful form submission]

In **Show Type**: select **Modal Window**

Save the form and publish your changes.

> **Note About Publishing On External Sites Using AJAX Transitions**
>
> If you are publishing a form to an external site and wish to use these AJAX methods, you will need to remove the script and link tags generated in the HTML package before publishing on the external site.

3. Replacing A Submitted Form With Another Page's Content

This allows you to slide-in another page's content over the top of the form, thereby hiding it once it has been submitted and giving instant access to content.

To achieve this, follow the steps given above, except:

In **Show Type**: select **Replace Form HTML**

> **Note About Multi-Section Form "Hide" Transitions**
>
> By writing Javascript plug-ins, it is possible to hide sections of a form, displaying only one section at a time so that the person filling in the form is presented with a small number of fields at one time so they are not discouraged from completing a long form. If you require this functionality then contact Sales for a quotation

Add To Cart Process – BETA

This is a new process which is in beta and will be moved into full production in the next release and full notes will be provided.

Session Handling Improvements

We have improved session handling to cater for users who have turned off cookies in their browser. They are advised to turn on cookies to use the full functionality of the site which fixes the issue of orders becoming disconnected to customer delivery details.

EU Cookie Law compliance***

We issued an email bulletin in May 2012 advising of EU Cookie Law compliance. To have this implemented for you on your site please contact Sales.

Adhoc Changes

Platinum Property Detection has been put into place for Rightmove integration

Order formats have been adjusted

Order Feed Added to Astute – orders can now be sent to the Astute system via an XML feed