



# **ELITE ENGAGE**

## **Customer Guide**

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# 1. Introduction to Elite Engage

Elite Engage gives the power to communicate effectively with your Customers through the means of E-mail, SMS and Push Notifications to the Elite Live App to drive new revenue streams and aid existing customer retention.

Elite Engage has been developed with the new General Data Protection Regulations (GDPR) 2018 in mind. Elite Engage alone will not make your company compliant with GDPR, but will allow you to create internal procedures around the software. The GDPR regulations cover your entire business so it is always recommended that you obtain the appropriate legal guidance from a qualified GDPR consultant.

# 2. Communication Opt-Ins

Each type of communication is categorised into an Opt-In Category.

There are two mandatory categories which are 'Correspondence' and 'Alerts' these Opt-Ins are automatically selected for all customers as these types of communication (such as a Booking Confirmation) are deemed to be outside of the scope of GDPR.

There are two optional categories 'News' and 'Marketing' for which your customers must have actively opted into to be able to receive communications of these categories.

There is also an optional opt-in to whether the member's name is displayed online to other members when making bookings, this is linked to the Web Private tick box on the Personal Details page of the customer record

## Customer Opt-Ins on Elite Live

Customers are required to have registered for the Elite Live online portal to be able to manage their Opt-In preferences. Opt-Ins are presented to the customer in the following scenarios:

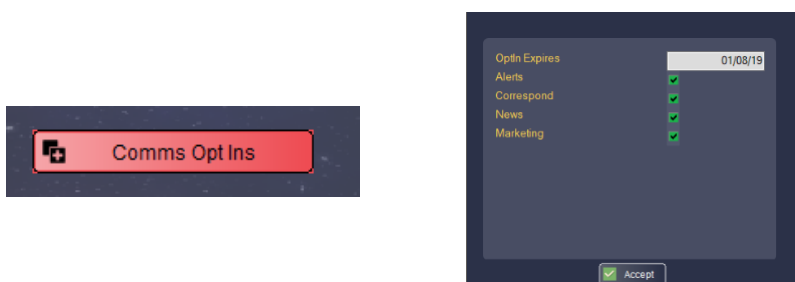
- When a customer first registers
- When a customer logs in and the Opt-Ins have not been confirmed for a period of 12 months or more
- When the customer navigates to their 'View My Profile' page

Opt-Ins are listed as below and will be defaulted to Not be ticked:

Available Opt-Ins	
<input checked="" type="checkbox"/>	Please tick this box to allow other members to see your name when checking booking availability and for your name, telephone number and email address to be shown in the Members Contact List
<input checked="" type="checkbox"/>	Selecting this allows ESP Club to send you newsletters, latest information and updates by email, post and other electronic means
<input checked="" type="checkbox"/>	Selecting this allows ESP Club to send you promotions and exclusive offers by email, post and other electronic means
<input checked="" type="checkbox"/>	Selecting this allows ESP Club to save on paper hardcopies by issuing you digital copies instead

## Viewing Opt-Ins via Elite

When viewing a Customer Record, on the Personal Details page there is an option to view their Comms Opt-Ins:



This can be used to remove opt-ins if you are made aware that the customer wishes to opt out. To Opt-In, customers should always be guided to Elite Live where they can set and confirm their preferences, Opt-Ins made manually will not be valid. The expiry date of the opt-ins is updated to 12 months time when the customer confirms their preferences via Elite Live, after this date is past the Opt-Ins will not be valid until they reconfirm via Elite Live.

### 3. Customer Record Data

Elite now records all of the customer’s interactions with the software in a new database of Customer Behaviours, it is based upon these behaviours that many of the communications are triggered.

The list of behaviours for a particular customer can be viewed from their Customer Record by Selecting ‘Action’, followed by ‘Behaviours’.



A grid of all entries is displayed and if required can be sorted in ascending/descending order by clicking on any of the headings in the grid.

Date	Time	Where	Category	Type	ActDate	ActTime	Value
13/03/18	15:59	Clubhouse	Sale		//	:	-0.30
13/03/18	14:18	Clubhouse	Sale		//	:	-0.30
13/03/18	14:17	Clubhouse	Sale		//	:	-3.72
13/03/18	13:42	EliteLive	WaitMove	ZUMBA01	13/03/18	19:00	0.00
13/03/18	13:41	Golf Shop	CreateBook	ZUMBA_W	13/03/18	19:00	0.00
13/03/18	13:41	Golf Shop	DeleteBook	ZUMBA01	13/03/18	19:00	0.00

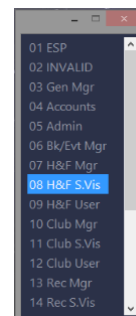
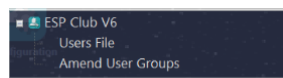
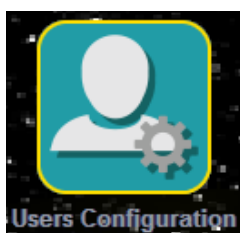
All communications that have been sent to a customer are also visible on the ‘Personal Details’ page of the Customer Record. Again, entries can be sorted by clicking on the headings. E-mails are displayed in light grey if not read and once read in green with a Status in the final column of O for Opened.

Date	Action	Who	Expires	Type	Description	S
15/02/18	MAIL	WWW	//	BOOKDELT	Your Booking Has Been Cancelled	
15/02/18	MAIL	WWW	//	BOOKMAKE	Booking Confirmed At Resort Demo	O
15/02/18	MAIL	WWW	//	BOOKMAKE	Booking Confirmed At Resort Demo	O
15/02/18	MAIL	WWW	//	EVENTLOC	A Change To Your Booking Location	O
16/02/18	MAIL	WWW	//	WAITMOVE	Booking Moved From Waiting List	

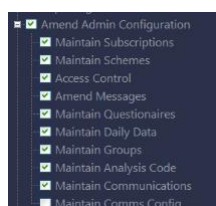
### 4. User Permissions

For a staff user to have access to complete the following steps below three new permissions are required to be given.

Select Users Configuration, Amend User Groups and then the Group to which you wish to amend permissions.



Within ‘Amend Admin Configuration’ the permission ‘Maintain Communications’ can be ticked. ‘Maintain Comms Config’ is solely used by ESP so should not be ticked, this will not give additional permissions:



To give access to send Member Communications, with ‘Customer Routines’ the permission ‘Member Communications’ should be ticked:



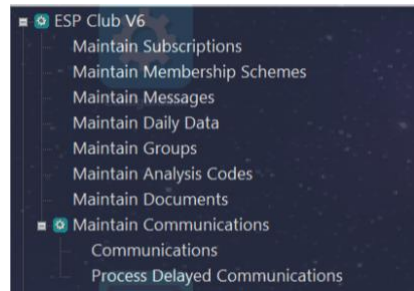
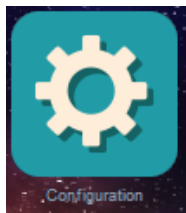
## 5. Managing Communications

Each Communication has a number of Values and Conditions, these control the specific rules that dictate when the communication is sent, the configuration of this is complex and is required to be set by ESP so if amendments are required please request this via your Account Manager.

Each Communication is given a Category:

- Alerts and Correspondence are mandatory and cannot be opted out of by customers
- Other categories such as News and Marketing are Opt-Ins and customers will only receive these communications if they have actively opted in.

To Access the Communication database, Select Configuration and then within your main Club's menu select Maintain Communications and then Communications.



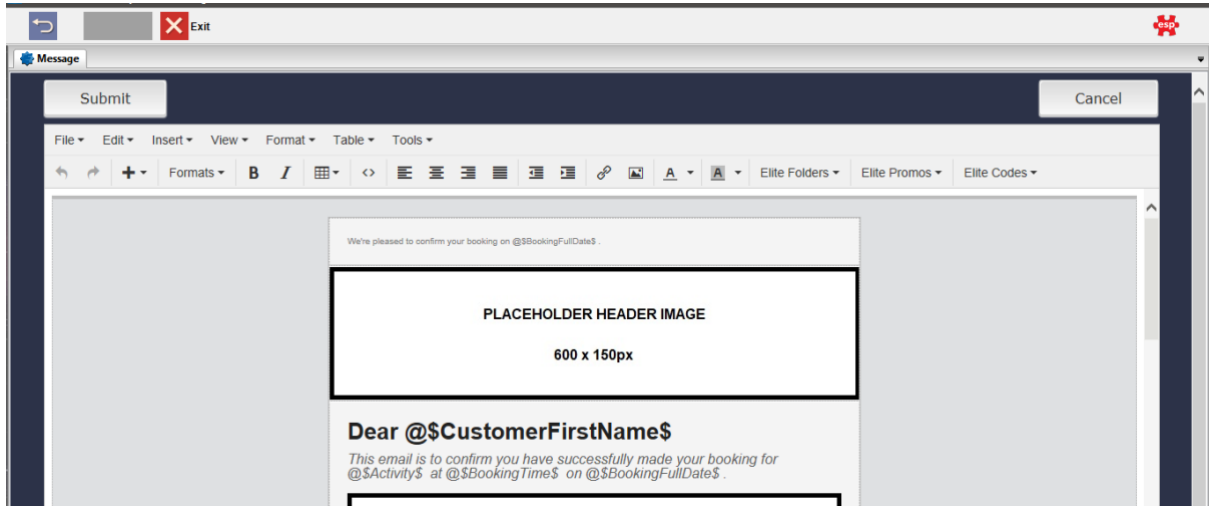
Select the communication you wish to amend, select the Accept menu button.

Options that can be amended:

- Valid From and To dates – These will restrict the dates between which the communication will function. If left blank the communication will not be restricted by date.
- Valid Days – Will control on what days of the week this e-mail will function on.
- Cat – This is the category of the communication. If set to an Opt-In category the customer must have actively opted in for the communication to be sent.
- Type:
  - Trigger communications are sent based on a customer behaviour having taken place.
  - Customer and Booking types are checked daily and if the communication is valid it will be sent each morning.
  - EventMsg is an Event Message Communication (see section 6)
  - AdHoc is an Adhoc Member Communication (see section 7)
- Trigger – If the Type is set to Trigger then this field defines the Customer Behaviour which will trigger the communication.
- Test – If ticked all communication emails will be sent to the test address instead of any live customers
- Delay Sending – If ticked the communications will be generated but not sent until the process detailed in section 6.

## Amending E-mails

To amend the content of an e-mail select the  button.



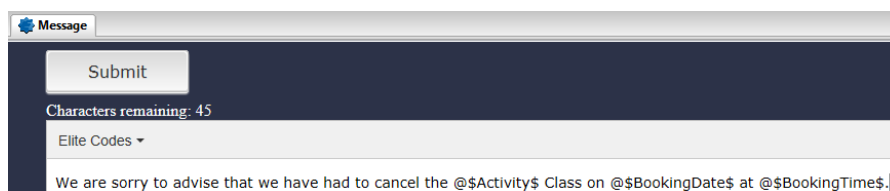
Text can be amended here and formatted using the buttons along the top of the editor window. Other options that are available include:

- Insert – From here you can insert pictures, links and files.
- Elite Folders – If enabled a link to Customer Attachments such as Statements and Invoices on Elite Live can be inserted from here.
- Elite Promos – Any Web Promotions created will be available to insert from here. If you do not have Web Promotions enabled please contact your Account Manager if you wish to arrange for this to be available.
- Elite Codes – All available variable data can be inserted from here, e.g. customer and booking details.

After amending the content, press Submit to save and exit.

## Amending SMS

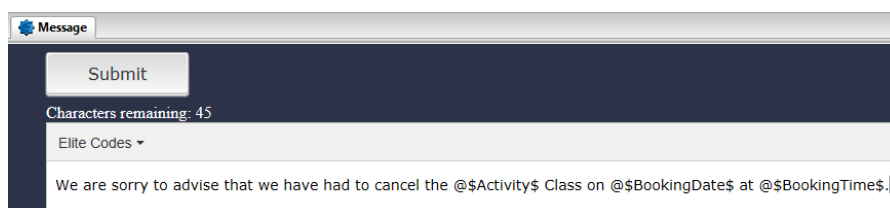
To amend the content of an e-mail select the  button.



As you start to enter text, a count of remaining characters is displayed above the text window; Elite Codes can be inserted using the dropdown at the top left of the screen. After amending the content, press Submit to save and exit.

## Amending App Push Notifications

To amend the content of a Push Notification select the  button.

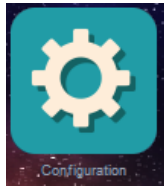


As you start to enter text, a count of remaining characters is displayed above the text window; Elite Codes can be inserted using the dropdown at the top left of the screen. After amending the content, press Submit to save and exit.

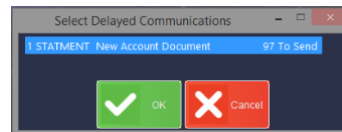
## 6. Process Delayed Communications

Communications that have been flagged as 'Delay Sending' will be generated but not automatically sent.

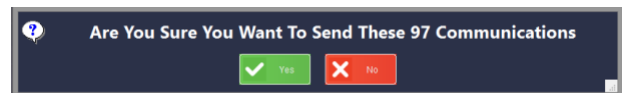
The view communications pending being sent, select Configuration and then within your main Club's menu select Maintain Communications and then Process Delayed Communications.



1. Communications pending are listed. Select the Communication to send.



2. Select yes to confirm that you wish to send.

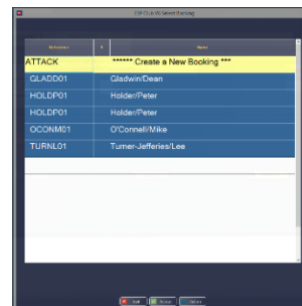


## 7. Event Message Communications

An adhoc communication can be sent to all attendees to an event if a change needs to be notified such as a cancellation of the event or a change of location. The communication will need to be initially configured by ESP and will be have a Type of 'EventMsg'.

### To send an Event Message:

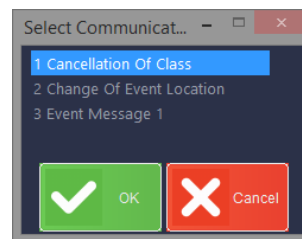
3. The content of the e-mail needs to be set as detailed in section 4.
4. From the bookings screen double click on the event to view the list of participants.



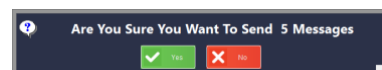
5. Select Action



6. Select the Communication that you wish to send.



7. You are asked to confirm that you wish to send the messages. Select Yes to complete.



## 8. Adhoc Members Communications

An adhoc communication can be sent to members of your Club for urgent unplanned communications such as 'Golf Course Closed'. To ensure that the Fair Use Policy is adhered to, this should not be used for communications such as marketing or regular news. The communication will need to be created by ESP and will have a Type of 'EventMsg'.

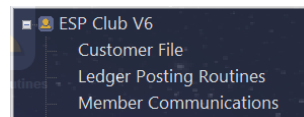
In addition to any bespoke conditions configured by ESP, Member Communications will only be sent to customers who meet the following criteria:

- A Record Type of Member
- A Membership Type is set to a number between 1-96
- A Renewal Date is set for a future date,

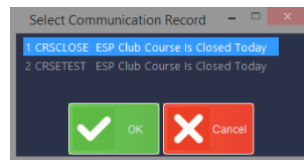
### To Send a Member Communication:

1. Firstly the content of the e-mail needs to be set as detailed in section 4.

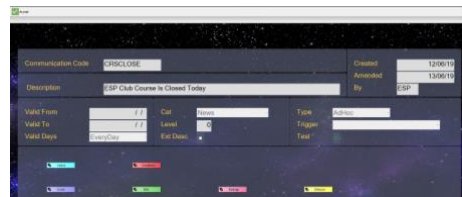
2. From Customer Routines, select 'Member Communications'



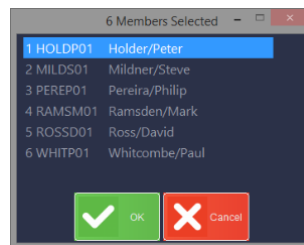
3. Select the Communication required



4. The communication is displayed where you may check or edit the Email content. Other settings may not be amended here. Press Accept to confirm.



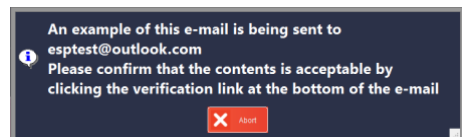
5. The number of recipients is confirmed and they are listed to verify the who is included. Press OK to confirm.



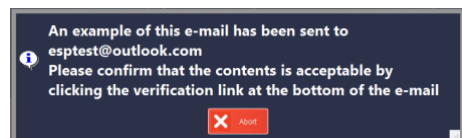
6. A Validation email will be sent to confirm the content is acceptable before it can be sent to all recipients. Enter the address for this to be sent to and press Accept to confirm.



7. A message is displayed confirming the Validation Email has been sent, this may take up to two minutes to complete.



8. Once sent, the message text updates to confirm that it has been sent.



9. If the Email content is acceptable, click the link at the bottom of the Email to approve it's content.



CLICK HERE TO APPROVE THE CONTENTS OF THIS EMAIL FOR SENDING TO MEMBERS



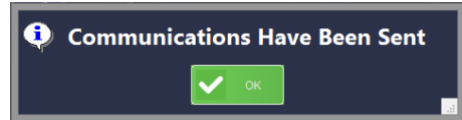
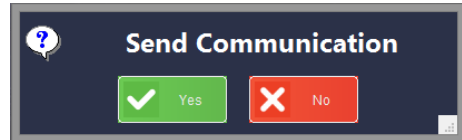
10. You are directed to a webpage to confirm that you have approved the Email.

11. Within approximately 20 seconds, the message in Elite will now update to enable you to send the communication. Select Yes to confirm.

12. Confirmation that Communications have been sent is given. Select OK to complete.

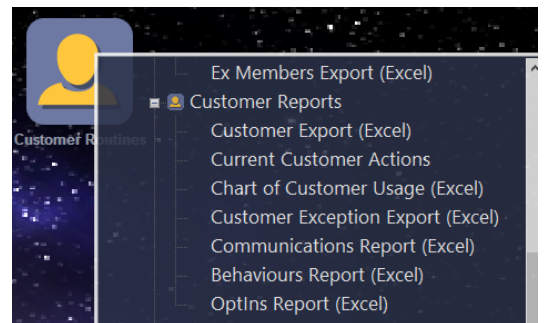
**Email Approved**

Please now complete the sending process within Elite



## 9. Reporting

A new suite of reports are available to allow you to analyse and measure the effectiveness of your engagement with your customers. These are available by selecting Customer Routines, Reports, Customer Reports:



### Communications Report

A date range can be chosen when running this report and the default Pivot Table setup displays each type of communication that has been triggered and the status of each (e.g. Sent / Viewed). Various filters are available at the top of the sheet and the fields can be amended using the standard Pivot Table options within Excel.

Day	(All)	Period	(All)	Year	(All)	Action	(All)
Count of Msg Reference	Column Labels	Sent	Viewed (blank)	Grand Total			
BOOKARRV		2	2	2			
Thanks For Being Here - Enjoy!		2	2	2			
BOOKMAK		263	13	276			
Your Booking is Confirmed		263	13	276			
BOOKNOSH		78	8	86			
We Missed You Yesterday		78	8	86			
BOOKTHNX		4	4	4			
Thanks For Yesterday		4	4	4			
CRSCLOSE		11	6	17			
ESP Club Course Is Closed Today		11	6	17			
CRSETEST		25	22	47			
ESP Club Course Is Closed Today		25	22	47			
EVT_002		5	5	5			
Change Of Event Location		5	5	5			
EVT_003		104	104	104			
Cancellation Of Class		104	104	104			
SALETEST		13	4	17			
Test Sale Communication		13	4	17			
SNRMEN		6	2	8			
Mens Senior RollUp Cancelled		6	2	8			
STATEMENT		12	5	17			
Monthly Statement Of Account		12	5	17			
(blank)							
(blank)							
Grand Total		523	60	583			

### Behaviours Report

A date range can be chosen when running this report and the default Pivot Table setup displays how many customer behaviours have been recorded at the different hours of the day for the period chosen. Various filters are available at the top of the sheet and the fields can be amended using the standard Pivot Table options within Excel.

Day	(All)	Period	(All)	Year	(All)	SalesArea	(All)	RecType	(All)						
Count of AddrCode	Column Labels	07	08	09	10	11	12	13	14	15	16	17	18	22	Grand Total
Row Labels															
ArmeBook															1
AssocBook															1
ConfirmBook															21
CreateBook		1			36	22	17	4	4	21	7	11	4	1	128
DeleteBook			2		6		2			6					16
DocRead				1	1			1	3	1	1				8
Document		1		559							1				561
LogIn		3	8	7	61	62	97	22	22	48	49	39	17	1	443
Sal			3		4	4	2	8		5	1	4			31
UnAssocBook															1
Grand Total		3	10	571	104	93	128	30	40	87	60	55	21	1	1211



## OptIns Report

This report displays the number of customer records in the database compared to the following counts:

- Web-Reg-Email-Sent – A count of those that have had a Web Registration Email sent
- Web-Private – A count of those with their Web Private tick box checked. This is unchecked if they agree for their name to be shared on EliteLive when confirming OptIn permissions.
- OptIn-Date-Valid - This is set if their OptIns have been confirmed on EliteLive within the past 12months.
- Optin-0 – A count of those Opted into Alert communications. This should be valid for all customers.
- Optin-1 – A count of those Opted into Correspondence. This should be valid for all customers.
- Optin-2 – A count of those Opted into News. This is set when the customer confirms OptIns on EliteLive.
- Optin-3 – A count of those Opted into Marketing. This is set when the customer confirms OptIns on EliteLive.

	A	B
1	RecType	(All)
2		
3	Values	
4	Count of AddrCode	82
5	Sum of Web-Reg-Email-Sent	60
6	Sum of Web-Private	58
7	Sum of Optin-Date-Valid	24
8	Sum of optin-0	29
9	Sum of optin-1	29
10	Sum of optin-2	25
11	Sum of optin-3	16

## 10. Elite Engage Fair Use Policy

You have a responsibility to ensure that Elite Engage is only used for appropriate and lawful communications, this will ensure that, as well as meeting legal obligations under the GDPR regulations, that you produce effective and targeted communication to your customers that have a high success rate.

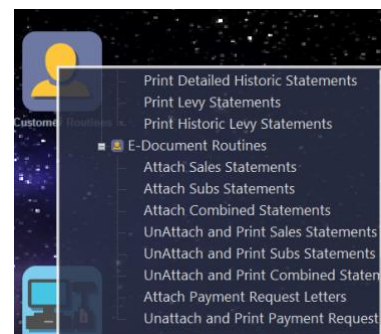
Please refer to our full Fair Use Policy for details of the restrictions that must be adhered to when using the Elite Engage system.

## 11. E-Docs

E-Docs allows for your Statement and Payment Request Letter documents to be published to your members online via the EliteLive portal; the balances due for these documents can then be paid by your members online.

### Document Generation

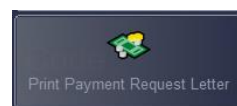
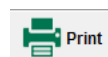
Your Statements and Payment Request Letters will either be configured to be created automatically at the end of every month or you will have an option in your E-Docs menu in your Customer Routines Report Menu to create these attachments:



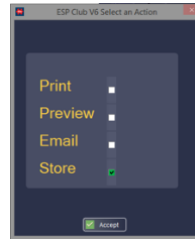
### Reissuing a Payment Request

If charges on a Member's renewal are amended, an updated Payment Request can be issued and published online:

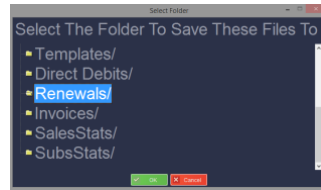
1. When editing a Customer Record, select 'Print'
2. Select 'Print Payment Request Letter'



3. Tick Store and then Accept



4. Select the folder in which your Payment Requests are saved to and select OK.



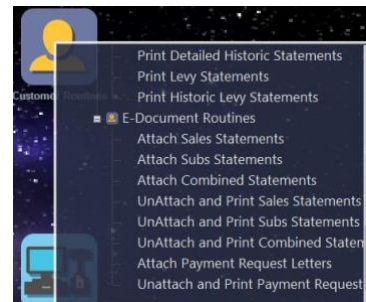
### Selecting Customers to be Paperless

On the Personal Details tab of each Customer Record is a Paperless flag which can be ticked to record that the customer has opted in to receive Paperless documents only. Each member can update this flag themselves on EliteLive when setting their OptIn preferences.



### Printing Paper Copies of the Documents

To print paper copies of the latest documents, reports will be available in your E-Docs Routines menu in Customer Routines. Variations may be present which print a subset of documents as per your requirements, e.g. "Payment Request Letters for those who are not opted in to Paperless"



### Reporting of Online Payments

Payments made online are recorded in the Retail Transaction Audit as a Type of AP (Account Payment) and Description of Web:

TY	St	Open	Date	Time	Ref	Description	Qty	Amount	Group	BillDate	BillTime	LocRef	Name
AP	-1	90	24/10/19	12:16		Web		216.50				HOLDP01	Holder/Peter
AP	-1	90	24/10/19	12:17		Web		770.00				HOLDP01	Holder/Peter
AP	-1	90	25/10/19	16:12		Web		80.75				HOLDP01	Holder/Peter

These payments are flagged as not requiring Cashing Up so will not affect the Retail End Of Day processes.

### Journal Postings

When Subscriptions are Made Due they are recorded on a System Journal Posting for the ESP Operator Number 90, these postings are closed at each Start of Day and automatic Posting Reports will be printed for these:

Journal Posting Report							GOLFmaster Golf Club		
Posting Number	: 0000000015					Date	: 25/07/17		
Journal Type	: System					Page No	: 1		
Status	: Closed					Operator	: 00090		
Description	:								
Address Code	Name	Memb Type	Type	Sub Code	Description	Amount Posted	Payment Posted	Date Posted	
LLOYA01	Ann Lloyd-Nwosu	H&F Individual	Add	H32	H&F Part. Mth	58.00		25/07/17 04:15	
			Add	H37	H&F Jnr Mth	20.00		25/07/17 04:15	
			Add	H37	H&F Jnr Mth	20.00		25/07/17 04:15	
			Add	H31	H&F Ind. Mth	70.00		25/07/17 04:15	
<b>LLOYA01</b>						<b>168.00</b>			
<b>Total</b>						<b>168.00</b>			
<b>Movement in Debtors Control</b>						<b>168.00</b>			