

# RELEASE GUIDE

March 2018



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For an overview of all the new releases and bug fixes in this version, [click here](#).

# Introduction

A new version was released—offering enhanced functionality, performance improvements, and more. An overview of all the new developments can be found in the [Product Release Notes](#). This guide shows you how to set up and use the new capabilities that were released.

Features are divided into two sections:

- **Generally Available** includes features that are available for all businesses to use. However, you may need to upgrade the version (zapp) or loader, or resubmit the app before certain features can be used.
- **Pilot** includes features that are only available to selected businesses—as part of a pilot program to properly test and improve features before they are released to all businesses. As such, these features are only visible to businesses who are participating in the pilot.

Note: You can see which updates or permissions are required for each feature from [Requirements](#).

# Generally Available

## Create Dynamic Reports

Create dynamic reports on sales, benefits, and app activity from the Hub’s new **Data Explorer** (rebranded from Qlik Sense). “Slice and dice” your data however you want—such as by member segment, location, year, week day, item, benefit, and more. [Learn how](#)

Dynamic Report

Time | Member Segment | Member Details | Communication | Purchases | Items | Benefits | Updated: 11/26/2014 - 2/20/2018

Report Type: Sales | Year | Month | Sales | Visit Frequency | Avg. Spend per Me...

Breakdown: Year, Quarter-Year, Quarter, Month-Year, Month, Week, Week Day, Measures

Date	Year	Q	Month	Q	Sales	Visit Frequency	Avg. Spend per Member
Totals					59,875,772	9.88	347.8
2015	2015		Dec		1,825,326	2.86	102.6
2015	2015		Nov		293,559	1.35	76.6
2015	2015		Jun		5,561	13.63	695.1
2015	2015		Jul		3,310	19.67	1,193.4
2015	2015		Aug		2,840	5.80	488.1
2015	2015		May		1,970	9.67	656.5
2015	2015		Oct		1,859	7.90	484.8
2015	2015		Apr		018	4.00	18.3
2015	2015		Sep		015	1.00	15.0
2016	2016		Dec		4,936,818	2.62	180.6

## View Purchase Tax

A new field was added to the POS API (*TotalTaxSum* in 2.8 and *totalTaxAmount* in 4.0) that allows the POS to report the total tax amount on a purchase, for tax-excluded countries. Since they report item prices and total purchase amounts without tax, this allows us to know how much the member actually paid.

View the tax amount in the Hub when looking at the purchase details from the member profile. Note: The field is only presented here if the POS actually developed it and sends it.

Data & BI

Dashboard | Data Explorer | App Analytics | Data Wizard | Find Members | Filter Members | Member Actions | Export Users | Employee Actions

View Purchases | User's profile

User Key: guNPyyelwheK7ZHA9BcThksj6LmWY0AE0aprQB88

Membership Key: edpGth59DuQ6B5LZDVnIK4wAadhGpdoNRnyu5RpQhrrrHVKLwPI8

Total	23.70	Tax	1.85
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Tags: Dining Room

## Removed Purchase Validations

To improve our data, the validations on purchase amount were removed to ensure that valid purchases are not rejected (since purchases were rejected due to rounding). This option was configured from the (removed) **Should items be validated?** field in the General POS Settings.

## Age Restrictions

Customers below a certain age are prevented from registering—according to the legal minimum age of the relevant country.

### How It Works

The customer's age is validated using their birthday, so it will only be validated if the birthday field is added to the registration form (and the customer actually fills it out). If the birthday is not added to the registration form, or if the member does not fill it out when it's optional, then the birthday will not be validated and underage members can register.

#### Notes:

- In reg. form, drop-down also now presents years in ascending order (instead of descending).
- If the business validates phone number by SMS, then age is only checked after the member enters the code sent by SMS.
- This applies to all registration/update methods—app, import, API, Hub or website.
- Currently, this only affects new customers (not existing underage members).

### Minimum Age to Register

- EU/UK – 16
- US – 13
- IL – 12
- Others – 13

## GDPR: Right to be Forgotten

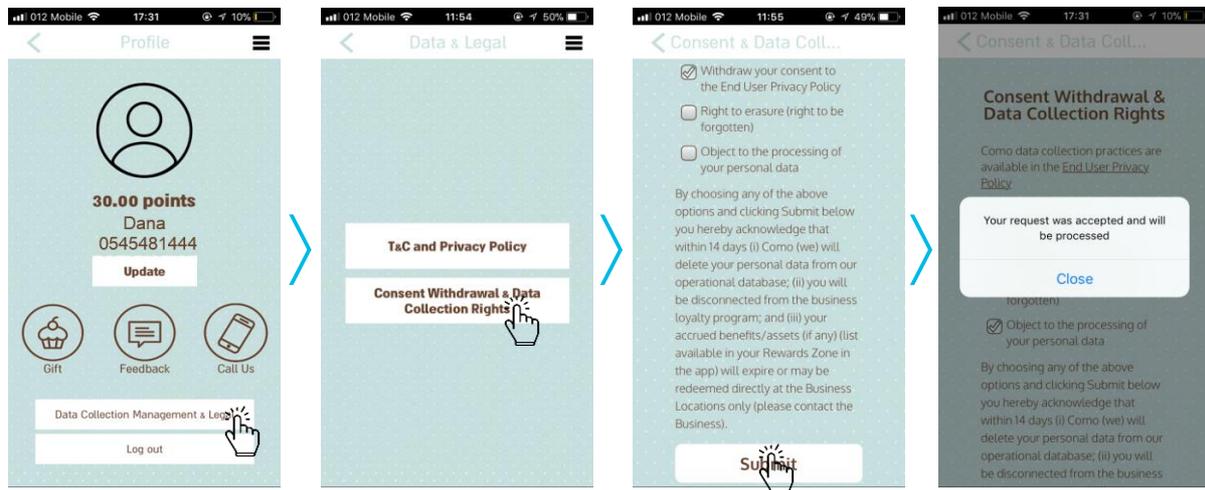
In preparation for the new European regulations (which applies to EU citizens in all countries), members can now more easily exercise their right to be forgotten.

### How It Works

1. Member requests to be deleted via new app legal screens (or other ways like app feedback).
2. Business must make alternative arrangements for certain types of member benefits.
3. Member is deleted through the Hub with their personal data and benefits within 14 days.

### 1 – Request

Members can request to be deleted (along with their personal data)—using the new legal screen in the member profile or in other ways (like via feedback). Here’s the main app user flow:



Once the request is sent:

- Email notification is automatically sent to the business (and other feedback email addresses), Como support, and Como legal
- Member is unsubscribed from marketing SMS and emails
- Log in Hub member profile: *Member requested to delete their membership and personal details*

**Note:** Como only monitors requests that are made from the app legal screens.

### 2 – Benefits

Member benefits are divided into two groups:

Group	Examples	Until the membership is deleted (and within the 14 days)...
Accrued assets	Gifts, points	Member can still use and accumulate them.
Unique assets	Purchased coupons, gift cards	Business must: 1) refund them or allow the member to use them directly through the business; 2) remove this asset from member (Hub profile)

### 3 – Delete

Within the 14 days, the business must delete the member’s personal info as follows:

- ✓ Click **Delete Membership** in Hub profile to erase their name, phone, email and home address.
- ✓ Manually erase any **additional info** they collected or stored that could identify the member.
- ✓ Erase any personal info they saved **locally** (such as exported reports).
- ✓ Delete their details from non-Como marketing messages (SMS or email) **distribution lists**.
- ✓ Notify any relevant **3<sup>rd</sup> party** (like POS, ordering, payment, or marketing messaging solutions) to erase any info that was shared with them from their databases within the 14 days.

### After Delete...

What happens when you click **Delete Membership** in the Hub?

- **PII**—name, phone, email, address, official ID number, external member ID are anonymized
- **Old PII**—previous PII that was updated is also erased (ex: old address before they updated it)
- **Actions**—our data & BI still counts the past actions, but you can’t view their personal info
- **POS**—Member can no longer be identified at the POS (*getMemberDetails* returns an error)
- **Benefits**—Member can no longer accumulate or use any accrued assets (like gifts and points).
- **App**—Member is automatically logged out of the app.
- **Log**—Log in Hub member profile: *Membership and personal details has been deleted*

In general, all **exported reports** that were generated from the Hub more than a year ago are deleted so that the PII will not be available in these past reports.

Note: If the business didn’t delete the membership within the 14 days, Como will delete the member’s personal info (only if the request was sent via app legal screens).

### Setup & Preparation

Here’s what’s required to enable the above flow:

- ✓ **New Layout**—App must be updated to the new layout of the profile screen (all apps will be updated gradually before the GDPR takes effect, and old layouts will no longer be available).
- ✓ **Email**—Business email address should be updated so they receive the email notification (by updating feedback addresses in app text: *InfoUpdates.FeedbackTile.MailTo*).
- ✓ **Permission**—Business must get the Hub permission needed to view the Delete button.
- ✓ **Communication**—Business must understand the new flow, and their responsibilities.

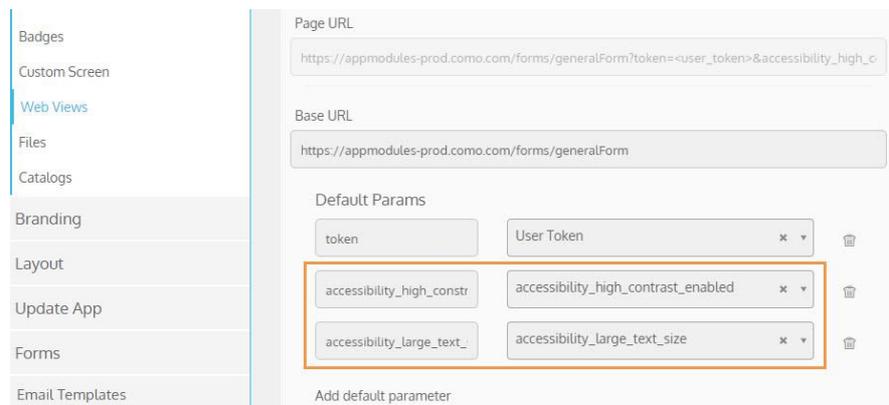
## Accessibility Support

To comply with IL accessibility regulations, voice over for all app screens was improved, voice over is now supported in certain web views, and accessibility features are now supported in the web views that are integral to the main app flows. The following web views are currently supported:

Web View	Voice Over	Size & Contrast
Registration/Update Forms	✓	✓
Login Form	✓	✓
User Profile		✓
Legal Screen		✓
Web Location List (Layout 1)		✓
Web Location List (Layout 2)		✓
QR Code Screen		✓
Barcode Screen		✓
Image Wrapper		✓
Active Survey		✓
Active General Form		✓
Survey		✓
General Form		✓

An extra step is required to support accessibility for *existing* forms and surveys (new forms/surveys are already supported), and iFrames that the business wants to add to their website (like the registration form).

From **Content > Information > Webviews**, update the web view URL with default parameters:



Example:

`https://appmodules-prod.como.com/forms/generalForm?locationid=5145&formid=1189&token=<user_token>&accessibility_high_contrast_enabled=<accessibility_high_contrast_enabled>&accessibility_large_text_size=<accessibility_large_text_size>`

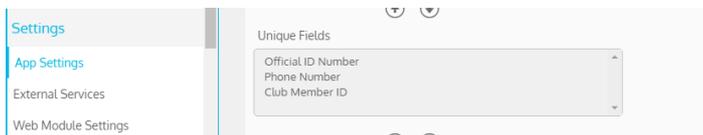
## Send App ID Codes by SMS/Email

Third-party platforms (like ordering sites and self-service kiosks) can use the new *sendIdentificationCode* API call to ask Como to send members their temporary ID code by SMS or email (instead of generating it from their app). [View the API documentation](#)

The code can then be used by the member to securely identify (since a more secure identification is important when members don't interact with a cashier). In addition, the member won't have to provide additional codes for this purchase such as the verification code to pay by points.

### Setup

- 3<sup>rd</sup> party must implement the new API call
- The identifier chosen by the business to use for this validation (i.e., phone number or email) should be configured as a unique field in **Settings > App Settings**:



### New Logs in Member Profile

New logs were also added:

- Failed to send member identification code by SMS
- Failed to send member identification code by email
- Email sent to member with identification code

Note: If the identification code is sent by SMS, the regular SMS log is displayed.

## Smart Migrations, Redeem Codes & More

To improve platform stability:

- all "old" gifts will be automatically converted into Smart Gifts
- old punch cards and birthday automations were removed (since they were already migrated to smart ones, this won't affect any businesses)

To prevent bad configurations, the default for **Redeem Code Type** is now **Autogenerated Codes** and a validation was added to prevent adding conditions/actions when **Redeem Code Type** is **None**.



## Decimal Settings

The following changes were made related to decimals:

- All monetary fields (such as purchase amounts) are now *only* displayed in “dollars”—including in the Hub logs, app, and webviews (like the purchase history screen).
- All monetary fields are now only inputted in “dollars”—such as in gift and automation conditions. For example, for a business that works in “cents” (i.e., without decimal), you need to now input 20 instead of 2000.
- Points and credit are displayed with 2 decimal places in the Hub for businesses configured “with decimal”. For example, 20 points is displayed as 20.00. No changes were made to point/credit displays in the app.

## Marketing Email Enhancements

Enhancements were made to our marketing email capability.

### Email Footer

All business data displayed in the footer is now configurable from **Settings > External Services**:

The screenshot shows the 'Marketing Emails' settings page. On the left is a sidebar with 'Settings' and various sub-sections. The main content area is titled 'Marketing Emails' and includes an 'Email Footer' section with three input fields: 'Business Email Address' (containing 'Rachel' and '@ como.com'), 'Phone' (containing '555555555'), and 'Address' (containing '555 Cherry Lane, Birmingham, Alabama, US').

Note: All template emails are also now treated as marketing emails—to legally protect businesses

### New Stats

You can view statistics for emails sent from **Filter Members** or **Import User Keys** from the template screen in the **Content** tab. The following new statistics were added:

- **Open rate** = [unique opens/# delivered] x 100
- **Click rate** = [unique clicks/# delivered] x 100
- **Delivery rate** = [# delivered/# sent] x 100

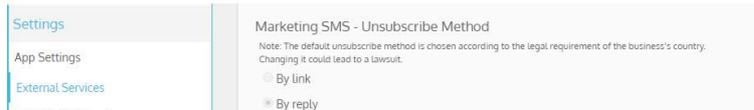
Note: *Unique* means that if the same member does it twice, it only counts it once.

## Unsubscribe Improvements

Various changes were made related to allowing marketing SMS or emails.

### Default SMS Unsubscribe Method

A default SMS unsubscribe method was set per country (aligned with their legal requirements): by reply for Israel, and by link for other countries. A permission tag is required to change the unsubscribe method for a specific business: *unsubscribe.configuration*



### Unsubscribe from Hub

From the member profile in the Hub, members can be unsubscribed from marketing SMS or emails. A permission tag is required to view the new buttons: *unsubscribe.configuration*



### New Subscribe/Unsubscribe Logs

New logs for when members subscribe, or unsubscribe (via Hub, app, import, or API):

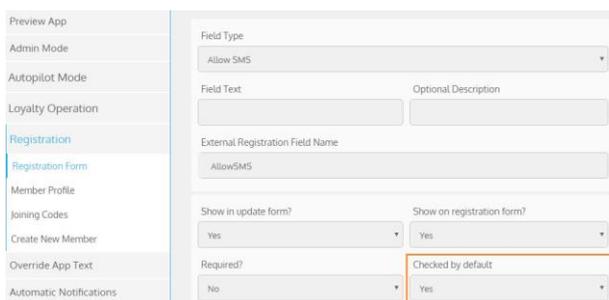
- Unsubscribed (via Hub, API, import, or app) from receiving marketing SMS
- Unsubscribed (via Hub, API, import, or app) from receiving marketing emails
- Subscribed to receive marketing emails
- Subscribed to receive marketing SMS

Note: Members can only subscribe when they register, or using the update form (in app or website).

### Registration Form Changes

The following changes were made to the registration form:

- **Allow Email** added to the registration form fields, and email added as default field in the form
- Option to configure the default of checkboxes in registration form, such as Allow SMS— where the default for this field is **Yes**



## Bulk SMS in US (Short Code)

Bulk marketing SMS is now supported in the US—since the requirements were completed to receive Short Code approval. For example, the member can send an SMS with “HELP” to the short code and receive a reply with the contact details for Como support. The business will not be charged for this SMS reply.

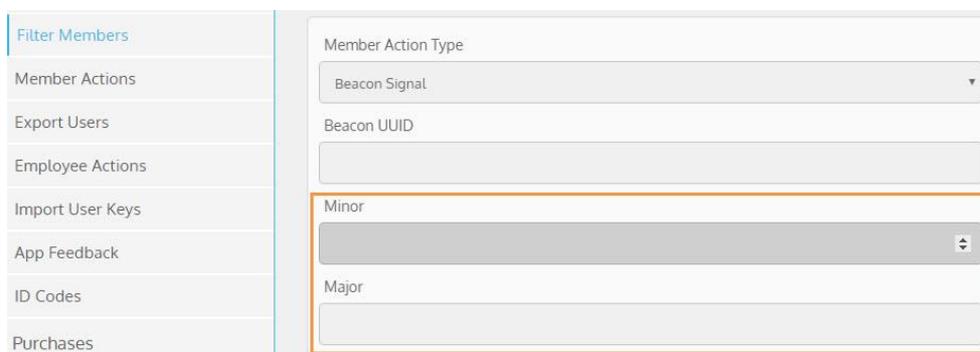
## New Server Infrastructure

To improve stability and performance, the server infrastructure was migrated from Google App Engine to Kubernetes. While improvements can already be seen, the scope and extent of these improvements will be determined moving forward.

## Add Conditions for Specific Beacon Devices

Filter members or add automation conditions based on receiving a beacon signal from a specific beacon device—using the new **Major** and **Minor** fields. You can find out which Major and Minor identifiers correspond to each beacon from the beacon provider.

Note: The dwell event for beacons was removed from the Hub filters as it's not yet supported.



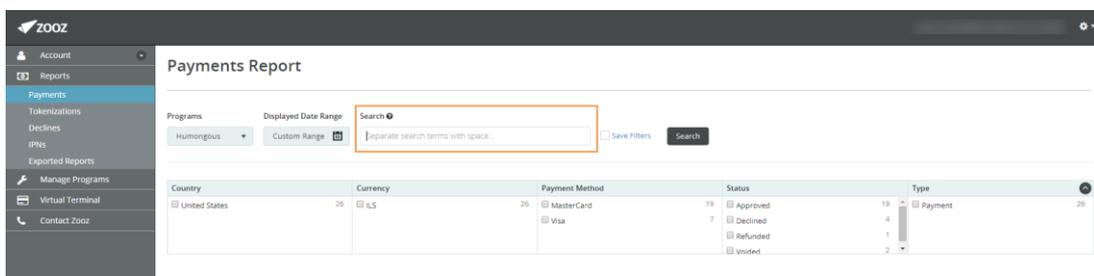
The screenshot shows a 'Filter Members' interface. On the left is a sidebar with navigation options: Filter Members (highlighted), Member Actions, Export Users, Employee Actions, Import User Keys, App Feedback, ID Codes, and Purchases. The main area contains filter fields: 'Member Action Type' (a dropdown menu with 'Beacon Signal' selected), 'Beacon UUID' (a text input field), 'Minor' (a dropdown menu with a blue arrow icon, highlighted by an orange border), and 'Major' (a text input field, also highlighted by the orange border).

## Zooz Payment Token

To provide better support, purchases in the Hub can now be linked to payments in the Zooz portal using the **Zooz Payment Token**. From the Hub, you can view the Zooz payment token in the mobile payment log in the member profile, or you can search for the mobile payment from Filter Members using the Zooz payment token.

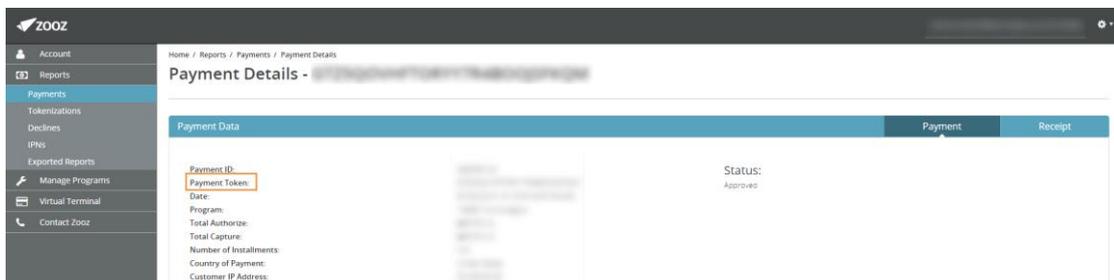
To provide members support for their Zooz payment (such as to cancel it):

1. Search for the member (by identifier) or purchase (by transaction ID) in the Hub.
2. Find the Zooz Payment Token from the mobile payment log in **Latest Logs** (member profile).
3. Search for the Zooz Payment Token in the Zooz portal.

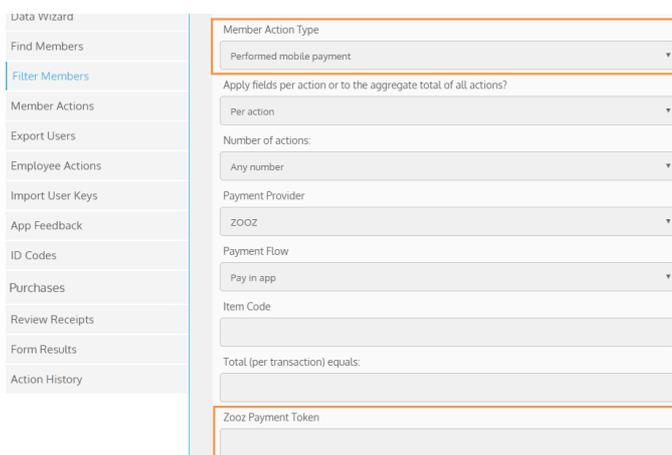


To find the member or purchase related to the Zooz payment:

1. Take the **Payment Token** from the Zooz portal.



2. Search for the mobile payment with this payment token from **Filter Members**.



## Add Coupon Code Button Actions

Add an additional button action to perform when the coupon code succeeded (in addition to the action which is performed by the automation). For example, you can use this to present a confirmation pop-up so the member won't try to re-enter the code, or you can use it to open a specific app screen (like the Gift List).

In general, you can allow members to enter coupon codes into the app in two ways:

1. By choosing a layout for the Rewards Screen that already has a **Insert Coupon Code** tile, OR
2. By adding the **Enter Coupon Code** action to any button in the app (like a layout block that you can add to a custom tile on a Rewards Screen, or Home Screen).

You can only add an additional action (like a success pop-up) using option 2—where the additional action is specified when you add the **Enter Coupon Code** action to a button. Some examples:

The image displays two side-by-side screenshots of a configuration interface for the 'Enter Coupon Code' button action. Both screenshots show the same initial configuration: 'Enter Coupon Code' as the main action, 'Open Pop-up Message' as the additional action, 'Success!' as the title, 'Your gift is waiting for you...' as the message text, and 'View Now' as the button text. The 'Show Cancel Button on Pop-up Message' checkbox is checked in both.

The left screenshot shows the configuration for the pop-up message's 'OK' button. The 'Button Action' is set to 'Open App Screen', and the 'Choose an App Screen' dropdown is set to 'Gift List'. The 'Show Cancel Button on Pop-up Message' checkbox is checked, and the 'Button Action' for the cancel button is set to 'No Action'.

The right screenshot shows the configuration for the pop-up message's 'Cancel' button. The 'Button Action' is set to 'No Action', and the 'Show Cancel Button on Pop-up Message' checkbox is checked, with the 'Button Action' for the cancel button set to 'No'.

## Filter by Multiple Item Codes/Branch IDs

Add search filters which include multiple item codes or multiple branch IDs (separated by a comma)—for example, to filter members based on their purchase. When you add multiple values for these field, it will search for any purchases that satisfy *at least one* of these values (i.e., there's a hidden “or” between the values). For example, here's how to search for purchases in business locations corresponding to branch ID 55 or 44:

The screenshot shows the 'Filter Members' interface. On the left is a sidebar with navigation options: Filter Members, Member Actions, Export Users, Employee Actions, Import User Keys, App Feedback, ID Codes, Purchases, Review Receipts, and Form Results. The main area contains the following filters:

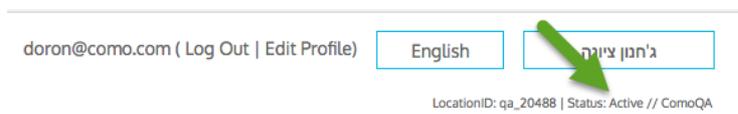
- Member Action Type:** Purchased a specific item
- Apply fields per action or to the aggregate total of all actions?:** Per action
- Number of actions:** Any number
- Item Code:** 1223, 5555, 8764
- Branch ID:** 55, 44

**Note:** If you want to find purchases that contains ALL items, you need to add multiple search filters.

## View Salesforce Status in Hub

Using the Salesforce API, a new service was developed to extract data from the Salesforce database. This allows us to automatically present the Salesforce business status in the Hub header, and other related details in the Hub settings. In addition, developers can now focus their queries on data from real/active businesses when extracting important product data (such as usage of a functionality).

For example, you can see in the header if the business is active.



And you can view other details from **Operation > Settings > App Settings**:

The screenshot shows the 'Settings' interface. On the left is a sidebar with navigation options: Settings, App Settings, External Services, Web Module Settings, General POS Settings, Point/Credit Settings, and Website Settings. The main area shows the 'App Settings' section with the following fields:

- Salesforce Status:** Pre-Launch
- Salesforce Substatus:** Specification
- Salesforce Vertical:** Food & Drink

**Note:** This capability is not yet available for all businesses.

# Pilot

## Use RFM Customer Segments

Based on purchase history and behavior, customers are automatically segmented using to the RFM model based on how recently they visited, how often they visited and how much they spent—allowing you to target each segment in the most effective way. These segments are represented using member tags. [Learn more](#)

# Requirements

Here are the updates and permissions required to use the capabilities that were released:

Capability	Pilot	Permission	Zapp	Loader	Resubmission
Create Dynamic Reports					
Use RFM Customer Segments	✓				
View Purchase Tax <sup>1</sup>					
Removed Purchase Validations					
Age Restrictions					
GDPR: Right to be Forgotten <sup>2</sup>		✓	✓		
Accessibility			✓		✓
Send App ID Codes by SMS/Email <sup>1</sup>					
New Server Infrastructure					
Decimal Settings					
Smart Migrations, Redeem Codes & More					
Marketing Email Enhancements					
Unsubscribe Improvements <sup>4</sup>		✓			
Bulk SMS in US (Short Code)					
Zooz Payment Token					
Add Conditions for Specific Beacon Devices					
Add Coupon Code Button Actions <sup>3</sup>			✓		
Filter by Multiple Item Codes/Branch IDs					
View Salesforce Status in Hub					

<sup>1</sup> Must be supported by the 3<sup>rd</sup> party integration (such as POS, ordering, etc.)

<sup>2</sup> Permission required to delete, Zapp required for new layout and legal screens

<sup>3</sup> Requires Zapp Version RTL 492/LTR 418

<sup>4</sup> Permission is required to unsubscribe from the Hub, and change the unsubscribe method