

RELEASE GUIDE

December 2016



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Como Hub Access By Branch

You can provide specific Como Hub users with access to data of only certain branches. For example, give store managers access only to data related to their store. This feature is especially relevant for businesses that use a franchisee business model.

How It Works

From Filter Members, the Como Hub user can only view data corresponding to:

- Actions based on purchases or activity that occurred in their branch such as purchases, redeems, punches, etc. The branch in which the action occurred is determined by the branch ID sent by the POS.
- Non-store related actions of their branch's members such as opened the app, joined the club, etc. The branch of the member is determined by the Home Branch ID associated with the member, usually through the registration form.

From Find Members, the Como Hub user can either search for only their branch's members, or view all members. However, they cannot specifically search for another branch's members.

Setup

Setting up this feature involves adding branch IDs to the locations in the location list, adding the Home Branch ID field to the registration form and restricting access of the user to only specific branches.

To set up this feature:

1. From **Content > Information > Locations**, add the branch ID for each location.
Note: It should be the *same* branch ID as the one sent by the POS with transaction details.

The screenshot shows the 'Content' management interface for 'Garcia's'. The left sidebar lists 'Information', 'General Info', 'Locations', 'Welcome Messages', 'Splash Screen Ads', and 'Photo Gallery'. The main content area is titled 'Add Tags' and includes a 'tags_placeholder' input field, a 'Publish Status' dropdown menu, and a 'Publish' button. Below these, a field labeled 'Branch ID (sent by POS)' is highlighted with an orange border and contains the value '1234'.

2. From **Operation > Registration > Registration Form**:
 - a. Add the **Home Branch ID** field to the registration form.
 - b. Create a drop-down with values for this field. The option text should be the name of the branch. The value saved should be the branch ID corresponding to this branch (the same as the one added in step 1).

- c. This field should be mandatory (to ensure each member is associated with a home branch).

Note: If the business uses the **Favorite Branch ID** field in their registration form, contact our Product Team about how to migrate member data to the **Home Branch ID** field.

The screenshot shows the 'Edit Field' configuration interface. The left sidebar lists various operations, with 'Registration' selected. The main panel is titled 'Edit Field' and contains the following elements:

- Field Type:** A dropdown menu set to 'Home Branch ID' (marked with callout A).
- Field Text:** An empty text input field.
- Optional Description:** An empty text input field.
- To use a drop-down list, add list options:** A section with an 'Add Options' button and a dashed box for options.
- Option Text:** A text input field containing 'São Paulo' (marked with callout B).
- Value Saved (to Database):** A text input field containing '1234' (marked with callout B).
- Add HTML:** An empty text area.
- Show in update form?:** A dropdown menu set to 'Yes'.
- Show on registration form?:** A dropdown menu set to 'Yes'.
- Required?:** A checkbox that is checked (marked with callout C).

3. From **acp > Manage Como Hub Users > Update User:**
 - a. Under **User Locations**, click the  icon corresponding to the business.
 - b. Select the branch you'd like to give the user access to and click **Add**.
Note: The list of branches is based on the locations added in the Content tab.
 - c. You can add more branches or remove branches by clicking the trash icon. Then click **Save**.

The screenshot shows the 'Manage branch permissions' dialog box. The dialog has a dropdown menu showing 'A & Q Apparel Ottawa' (marked with callout B). Below the dropdown are 'Add' and 'Save' buttons (marked with callout C). At the bottom, there is a section titled 'User Locations (unchecked to remove)' with two entries: '5145 A & Q Apparel' (checked, marked with callout A) and '5524 All in One(Copy)' (unchecked).

Export Events to External Systems

The new *export event* action allows you to send data to 3rd party systems, that can then use the data to perform actions externally. For example, inform a CRM when a new member joins the club, or send data to a business' mailing system to trigger an email. The type of data that's sent depends on which smart automation triggered the action or which search filter was added from Filter Members.

Action Fields

The export event action has the following fields:

- Name (optional)
- Destination URL (mandatory)



The screenshot shows a configuration form for the 'Export Event' action. It has three fields: a dropdown menu for 'Perform the action' with 'Export Event' selected, an empty text input for 'Name', and a text input for 'Destination url' containing 'http://'. The form is light gray with rounded corners.

Exported Data

The exported data sent to the 3rd party system includes:

- Date and time
- Automation trigger or search filter action type
- Name (provided by the user)
- Other context data depending on the trigger (such as membership or purchase details)

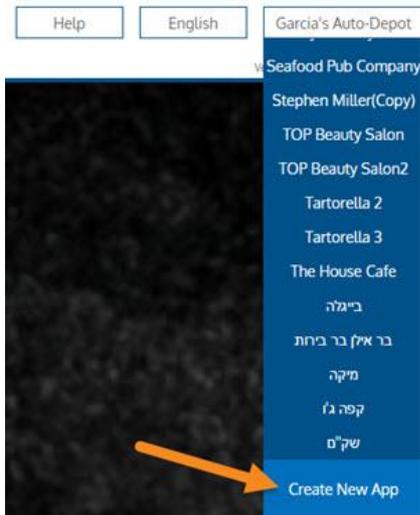
Note: When the action is performed from Filter Members, the context data only includes membership details in this phase.

Como Hub-SalesForce Integration

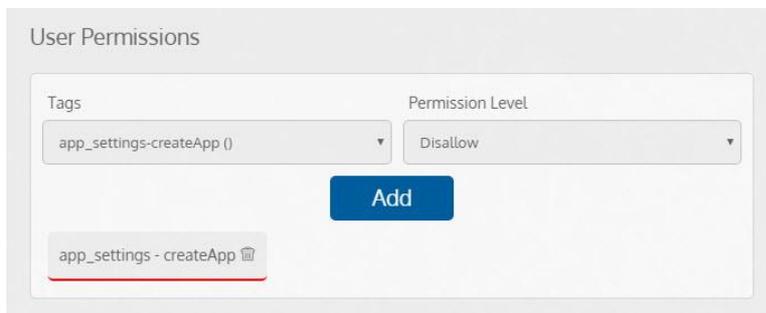
A new button was added to SalesForce that opens the app creation wizard when clicked. This allows us to link the apps that are created with the business in SalesForce. When an app is created this way, the SalesForce business ID is automatically added to the Como Hub (under **Operation** > **Settings** > **App Settings** > **External Reference ID**).

“Create New App” Button Permissions

A new permission tag was added to the Create New App button in the Como Hub—allowing you to remove this option from specific plans or users (for example, from businesses themselves).



You can remove this button from a user from **acp > Manage Como Hub Users**. Under **User Permissions**: select the **app_settings-createApp()** tag, select **Disallow** for the permission level and then click **Add**.



Smart Gifts – Add Dynamic Texts to Push Messages

When creating a smart gift, you can specify the text for the push notification that you can send with the smart gift. You can now add to these push notifications text parameters for member attributes. Messages can be personalized according to the member’s name, birthday, point balance, and more. For example, send members a gift with the following push notification "Hi @FirstName! Enjoy your new gift."

Note: This capability is only available when the smart gift is sent from a smart automation. If you want to send the gift from Filter Members, either specify a push message on the gift that doesn’t include dynamic text, or specify a push message without dynamic text from Filter Members (as a second action).

Garcia's

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Benefits

- Gifts
- Gifts
- Smart Gifts
- Point Shop
- Lottery Rewards
- Punch Cards
- Prepaid Cards
- Club Deals
- Codes
- Gift Cards

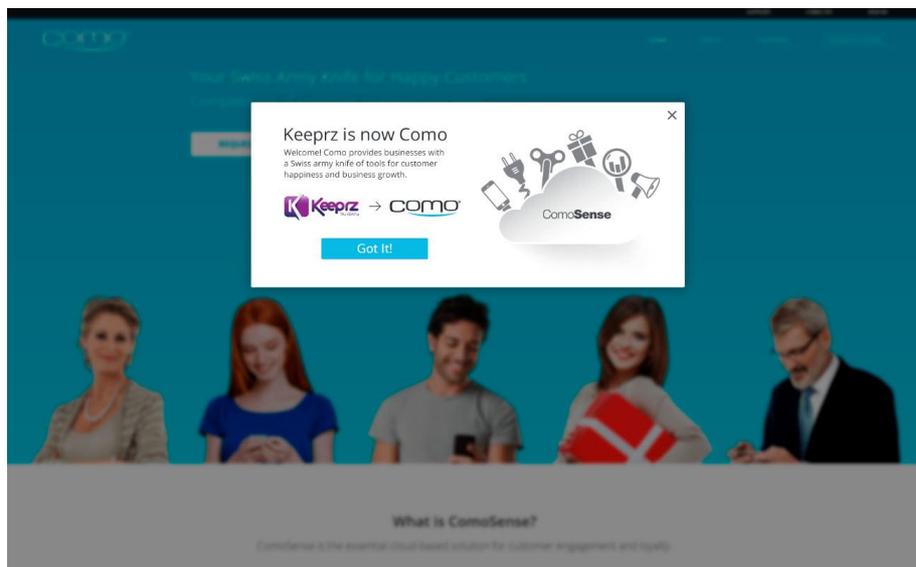
Value: 0 Cost: 0 Requires an employee code to redeem? No

Item's Short Name: Oil Change

Push Notification Message: Hi @Membership.FirstName! Enjoy your new gift.

Rebranding URLs

As part of the rebranding from Como Premium to ComoSense, a new URL is available for the login page of the Como Hub: <https://comosense.como.com/> From now on, this new URL should be used to access the Como Hub. In addition, the remaining Keeprz websites have been redirected to the corresponding Como websites.

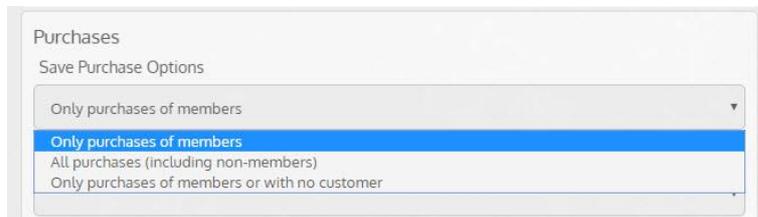


Save Purchases of Non-Members

A business can configure to save purchases according to these options:

- Save purchases of only members
- Save purchases of members or purchases sent without any customer identifier
- Save all purchases (including of non-members)

Note: The option of saving all purchases is the default for new apps. We recommend changing this field for existing apps to save all purchases as well.



Returning the Same Redeem Code

When a member generates a redeem code from their app and the code isn't yet expired, the same code will be displayed if the member tries to generate the code again. This prevents the member from being able to redeem the same asset more than once in a specific case.

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