GUIDEBOOK FOR OPERATORS

A step by step guide on using PeopleVine for your day to day activities.

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PEOPLEVINE
www.peoplevine.com
Latest Version Available at:
https://peoplevine.com/guide

Contents

PeopleVine Basics

We'll share with you a general overview of the basic tools within PeopleVine. Knowing these tools will help you get around the entire platform, stay informed and learn how to take advantage of the platform's capabilities. This area includes:

- Accessing the PeopleVine Platform and Available Tools
- Managing Alerts and Staying Informed
- Finding Help and Getting Support
- Manage Users, Payments and Integrations
- Importing Data

Accessing the PeopleVine Platform and Available Tools

As a user you have access to specific tools to help you engage with your audience. They should be utilized by the appropriate role/person at the right point of engagement. These tools include:

PeopleVine Control Panel

The PeopleVine Control Panel provides you with a suite of tools to manage every experience, track data, re-engage, build experiences and so much more. In addition to dashboards giving you real-time reporting and filters to get to the data that means the most to you.

Available at: https://control.peoplevine.com

User Type: Administrators, Operators, Marketers, Content Creators

PeopleVine Portal

The PeopleVine Portal is your front-end experience for your members, your customers… your people. When you configure something in the Control Panel, it will instantly be available for your people to engage with that experience. The portal is designed to be fully customized, branded and built to run your business end-to-end.

Available At: When activating your account, you will be able to setup your domain name to route to the PeopleVine Portal. Alternatively, we provide you with a free domain at yourname.clients.peoplevine.com.

User Type: Members, Partners, Affiliates, Approved Contributors

PeopleVine API

The brains behind it all, the PeopleVine API, available in SOAP XML, JSON Web Services, HTML API (HAPI) and our growing RESTful API, is designed to handle all the business logic, data processing, storage and more. Although our tools such as the PeopleVine Control Panel and the PeopleVine Portal provide for a complete experience, our PeopleVine API allows you to fully customize it.

Available At: https://developer.peoplevine.com

User Type: Developers

PeopleVine POX App

The PeopleVine Point of eXperience (POX) App enables your front-door staff to check-in members, print a chit at the hostess stand and update key staff members of who has arrived in real-time.

Available at: For iPads at https://peoplevine.com/pox

User Type: Front of the House Staff, Door Staff, Management, Check-In

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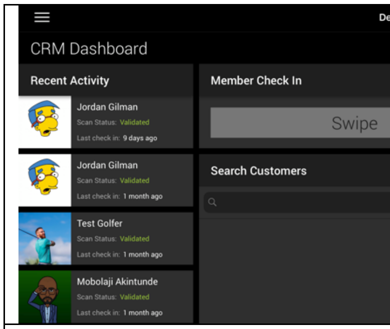
<td>
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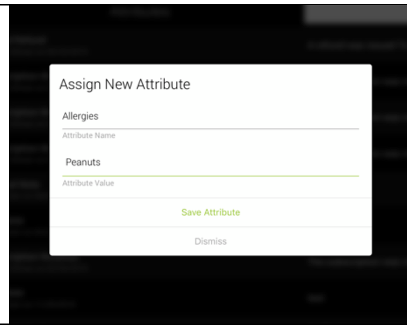
<td>
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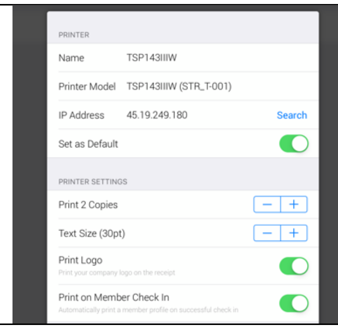
<td>
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<tr>
<td>Member Check-In and Live View of Visitors</td>
<td>Tag with Attributes and Manage Preferences</td>
<td>Connect to a Printer and Print a Chit on Entry</td>
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<tr>
<td>On the CRM Dashboard you can see who's in your space, check-in people by scanning their digital ID, swiping their card or searching by name.</td>
<td>See data tagged to their profile or add new data points to help you service your members with the best experience.</td>
<td>Get text messages to your watch when someone arrives or print a chit with detailed preferences to personalize their experience.</td>
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Checking People In with the POX

The POX provides a few different ways to check people into the platform:

- **Swipe**
  - Attach one of our approved card swipers and click on the Swipe button. This button only activates when attaching an approved card swiper. Simply swipe their card and the system will check them in.
- **Scan**
  - Tap the Scan button and leverage the iPad's camera to scan their digital membership card. Remember, when they download their digital membership card, it is designed to automatically pop-up on their iPhone when they're nearby your locations.
- **Search**
  - Simply search for a member by typing their name, email, phone number or any other info in the type-ahead under Search Customers. Find your member, click on them and tap on Check-In.

Printing a Chit

Once a member is checked-in or when viewing their profile, the POX app can print a chit containing information related to the member's prior experiences at your establishment. Some of the data that's included on the chit includes:

- Birthday and Anniversary dates
- Membership Tier
- Recent Visits
- Most Frequent eCommerce Purchases over Past 90 Days
- General and Priority Notes

On the bottom of the chit you will also find a barcode that can be scanned at the POS to attach a member's account to an order. In some POS integrations this would need to be scanned after clicking on the "member ID" button.

Approved Components

The POX app is currently certified with the following components:

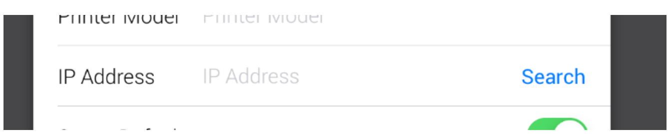
- **For Card Swiping:**
  - Magtek iDynamo (https://www.magtek.com/product/idynamo)
    - Please note these are only compatible with the iPad's with lightning cable. We are working on support for USB-C devices.

- **For Printing Chit:**
  - Star Micronics TSP143III Printer (https://starmicronics.com/pages/TSP100)
    - This comes in a WLAN and LAN version. If you can plug into an ethernet cable, you will get the best speed and performance. Otherwise, wireless setup requires either a WPS push button on your router (tutorial: https://www.youtube.com/watch?v=ca8zoL2PcX8) or advanced setup following their manual configuration guidelines at https://www.star-m.jp/products/s_print/tsp100iiiw/manual/en/settings/settingsWLAN.htm

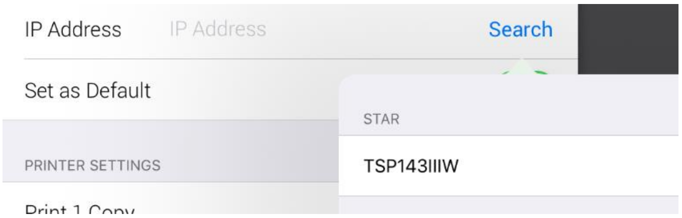
Setup Your Printer on the POX

Once your (approved) printer is connected to your network, you can connect the POX to the printer by following these steps:

1. Tap on the Hamburger Menu in the top left and click on Settings
2. Click on add a printer and then click on Search to find the printer on your network. Please make sure your tablet and printer are on the same network connection (LAN or WiFi).

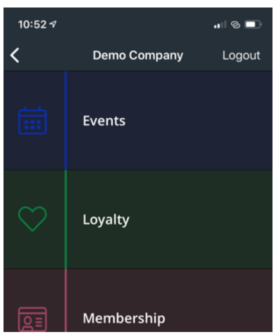


3. Once a printer is identified, simply tap on it to configure the rest of the settings.



4. You can now configure the rest of the settings for this printer. We suggest adjusting the settings to accommodate your specific needs.
5. You can confirm your printer is connected by finding a member and click on check-in or the chit button to print a copy of their chit.

If you are unable to find your printer, confirm both the printer and tablet are on the same network.



PeopleVine Venue App

The PeopleVine Venue App provides your staff with the tools to check-in event attendees, validate members, reward points, redeem offers and view CRM profiles.

Available at: For iOS both iPhone and iPad at https://peoplevine.com/app

User Type: Front of the House Staff, Door Staff, Waitstaff, Management

Check-In Attendees at an Event	Validate a Membership	Reward & Redeem Points
Pull up your guest list the day of the event and check people in by scanning their ticket or looking them up on the list.	Simply scan their membership card to validate them or look up the member by name or number to validate.	Reward points for completing on-site activities or redeem their points to keep track.

Redeem Offers & Vouchers	Manage People	Print Chit
See available vouchers and offers ready for redemption and click to redeem.	Find people in your CRM to view general notes, attributes or view their membership.	You can also print their membership information and preferences on entry.

Control Panel Check-In

The PeopleVine Venue App provides your staff with the tools to check-in event attendees, validate members, reward points, redeem offers and view CRM profiles.

Available at: For iOS both iPhone and iPad at https://peoplevine.com/app

User Type: Front of the House Staff, Door Staff, Waitstaff

/checkin

Enable your members to check-in and validate your member's membership as they visit in reciprocity. The /checkin tools is branded through your website and PeopleVine helps manage permissions, reporting and overall control.

Available at: https://yourwebsite.com/checkin

User Type: Available to and must be assigned to partners in the business directory.

QR Code + Pin

By using your iPhone's camera, you can simply focus on the QR code (on the digital ID) then tap the link to open and validate in real-time. We can even prompt for a location validation Pin to track the location and prevent tinkering.

Available at: For iOS use the camera app, for Android, download any QR code reader (pay for it to avoid ads).

User Type: Partners, Front of the House Staff, Door Staff, Waitstaff

/checkin/self

The self-service check-in is designed to allow your members to check-in on their own, while keeping you posted that they're in the space. As well, allowing their guests to notify they've arrived. This tool can be run on any device, including an iPad by pairing the suggested barcode scanner and following the directions below.

Available at: https://yourwebsite.com/checkin/self

User Type: Your members and their guests.

Suggested Equipment

We suggest you purchase the Symcode 2D Bluetooth Scanner. It can be found on Amazon here. If you choose to use another device, please ensure it's Bluetooth compatible, works with the device you're using (e.g. iPad), enables automatic scanning and can be used as a keyboard input.

When setting up this scanner, please make sure you do the following:

1. Pair the device via Bluetooth, by scanning the Bluetooth pairing on page 11 of the User's manual.

2. Setting it up in autonomous mode by scanning the QR code below (with the scanner).

3. You can turn off autonomous mode and use the trigger by scanning the QR code below.

Once your scanner is setup and connected to your device, go to a web browser and visit https://yourcompany.com/checkin/self. You can also setup a custom-domain with a blank layout to remove your overall branding. As part of this flow, there are 5 screens, each screen can be customized/replaced using HAPI and the appropriate keyword:

- /checkin/self - Self Check-In Screen
    - (keyword: checkin)
- /checkin/self/scan - Self Check-In Scanning
    - (keyword: checkin_scan)
- /checkin/self/scan - Self Check-In Scanning Valid Member
    - (keyword: checkin_scan_valid)
- /checkin/self/scan - Self Check-In Scanning Invalid Member
    - (keyword: checkin_scan_invalid)
- /checkin/self/guest - Self Check-In for Guest
    - (keyword: checkin_guest)

Check In Feature Comparison

Below is a grid of how the various tools in PeopleVine compare.

	Browser Based			iPad	iOS	Any Device
Feature	Control Panel	/checkin	/checkin/self	POX	Venue App	QR Code
Scan QR Code	✓	✓	✓	✓	✓	✓
Print Chit				✓	✓	
Swipe Physical Card	✓	✓		✓	✓	
Look up Member by Name/Data		✓		✓	✓	
Check-In Form	✓	✓				✓
Guest Check-In			✓			
Check-in with Sevenrooms Res	✓	✓	✓	✓	✓	✓
SMS Alert to Staff on Check-In	✓	✓	✓	✓	✓	✓
Location Pin		✓				✓
Self-Service	Semi	Semi	✓			Semi
Self-Service with Visual Feedback			✓			
Built In Scanner to Scan Digital Membership Card	✓* USB	✓* USB	✓* Bluetooth	✓	✓	✓
Swipe Physical Membership Card	✓*			✓*	✓*	
Mark Reservations as Arrived in Sevenrooms	✓	✓	✓	✓	✓	✓
Send Text Message or E-mail to Member on Arrival	✓	✓	✓	✓	✓	✓
Trigger Campaign Upon Check-in	✓	✓	✓	✓	✓	✓
Admin Take Notes on CRM	✓			✓	✓	
Admin Edit Membership Card	✓			✓		
Send Text Message or E-mail to Staff on Arrival	✓	✓	✓	✓	✓	✓
Check-In for Events	✓				✓	✓
Redeem a Coupon, Offer or Voucher	✓				✓	✓
Reward and Redeem Loyalty Points	✓				✓	

Learn more about the PeopleVine Check-In tools in this presentation at https://peoplevine.com/help/checkin.

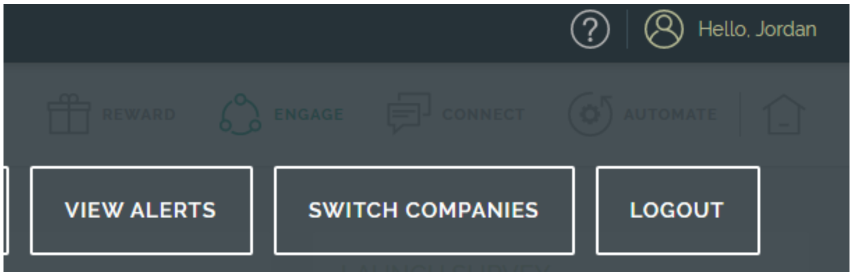
Managing Alerts and Staying Informed

There is a lot happening within your PeopleVine ecosystem, so it's important that you're being alerted on what matters to you most.

Setup Global Alerts for All Touchpoints

You can setup a global alert which will send you an email as soon as a touchpoint occurs for all items (e.g. for all surveys completed) by following these steps:

1. Click on Hello, Name in the upper right-hand corner.
2. Click on View Alerts.

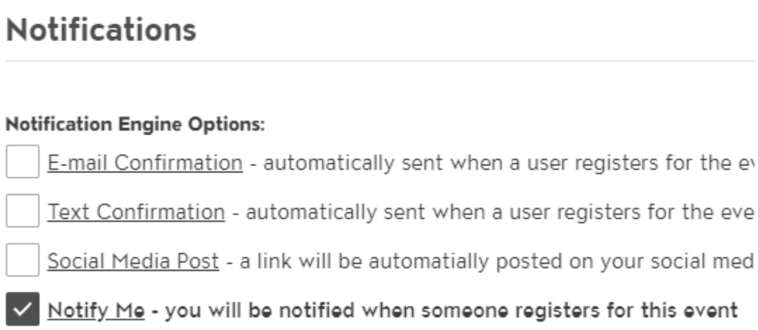


3. You will see the alerts you are subscribed to
4. Click on Enable Alerts to be notified anytime that activity is completed.

Setup Alerts for a Specific Touchpoint Completion

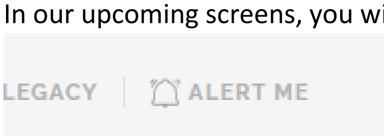
You can setup an alert for a specific touchpoint in the system. For example when someone completes the survey "Leave Feedback" we can send a single alert by following these steps:

1. When creating a new item (such as an event), you can check the Notify Me box under Notifications. This will automatically setup the alert for this item to be sent to you upon someone registering.



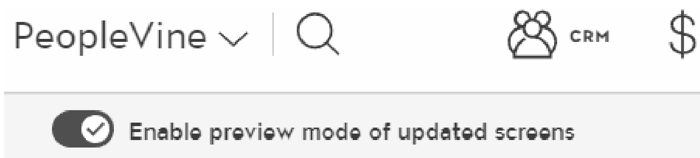
2. In our current active view, you will see the Notify Me or Manage Alerts button. When clicking on this button, you will have the ability to assign the alerts to other co-workers.

3. In our upcoming screens, you will see the Alert Me button.



To remove alerts, simply click on your name, click View Alerts and then you will see a list of the existing alerts that are in place.

Alternatively, we do suggest you check-in on PeopleVine on a regular basis. If you enable the new Preview Mode, you can see a running log of “actions to be taken” directly on the item’s menu. You can enable the Preview Mode by checking the option on the Main Menu.



Finding Help and Getting Support

We offer a variety of options to get help with PeopleVine:

- For the latest in help visit https://peoplevine.com/help.
- Join our Webinars at https://peoplevine.com/webinar
- Grab an Office Hour with a Solutions Expert at https://peoplevine.com/officehours (please note there may be a fee for this session).
- Watch videos on how to get things done at https://peoplevine.com/videos.
- Read our help tutorials at https://peoplevine.com/blog and https://support.peoplevine.com.
- As a user, we’ll automatically send you a monthly update with new features, tutorials and more.

Manage Users, Payments and Integrations

Administrators will have access to manage key components of the platform. This would include managing users, setting up the payment processor and integrating to 3rd party platforms such as Quickbooks or Omnivore for the POS.

Managing Users

It is important that you have good control over your users and what tools they are accessing. As of writing this document, permissions are grouped into 4 categories: Admins (do everything), Power Users (do mostly everything), Reps (limited CRM and other access) and No Access which prevents Control Panel access, but enables the apps.

You can manage your users by click on the Settings/Company Menu and click on Manage Users under Settings & Tools. Once in here, you can invite users, modify their access, change their password (and force reset), as well as request approval for “Send on Behalf of”.

Available at: https://control.peoplevine.com/admin_users.aspx

Setting Up Your Payment Processor

Before processing your first transaction in PeopleVine, we recommend you enable your payment processor. This will allow you to capture funds both on your website but also charge for over 15 different experiences in PeopleVine. We currently support 9 processors which includes the ability to integrate to our 3rd Party processor for even further integrations.

If you don't already have a merchant account, or if you do, we have negotiated lower rates for our clients starting at 2.75%. You can learn more at https://peoplevine.com/payments.

Available at: https://control.peoplevine.com/admin_processors.aspx

3rd Party Integrations

PeopleVine is integrated with 25+ platforms providing a seamless data flow between the two platforms for specific use-cases. The most popular integrations are Quickbooks, Omnivore (for POS integration) and Sevenrooms for table reservations.

Available at: https://control.peoplevine.com/admin_authenticate.aspx

Importing Data

You can import your existing contacts/people directly into the PeopleVine CRM from a CSV file. Watch the video tutorial at https://www.loom.com/embed/deea348575c74ef18c075d1f1d2b89be

Export Data From Your Contacts

Here are a few tutorials on how to export data from your existing contacts platform:

- Export Gmail Contacts
- Export iCloud Contacts
- Export Outlook / Office 365 Contacts
- Export Yahoo Contacts

Prepping Your Data for Importing

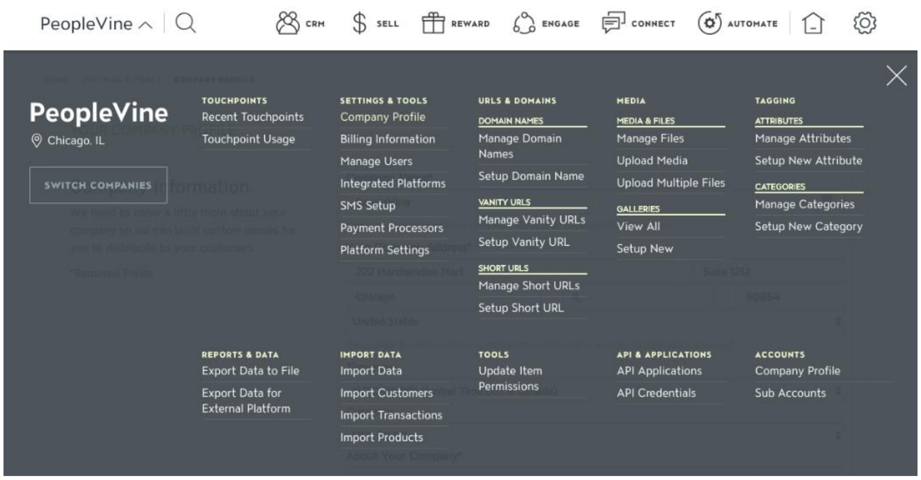
Here are some tips when setting up your file for import:

- Be sure to save/convert your file to a CSV (Comma Separated Values) file.
- We recommend you add attributes to the file, to further segment your list. Simply add a new column and enter the name of this attribute in Row 1. You can then enter the value for each person in each row. (see image below)
- Our system will automatically merge any data associated with the same email address or mobile number

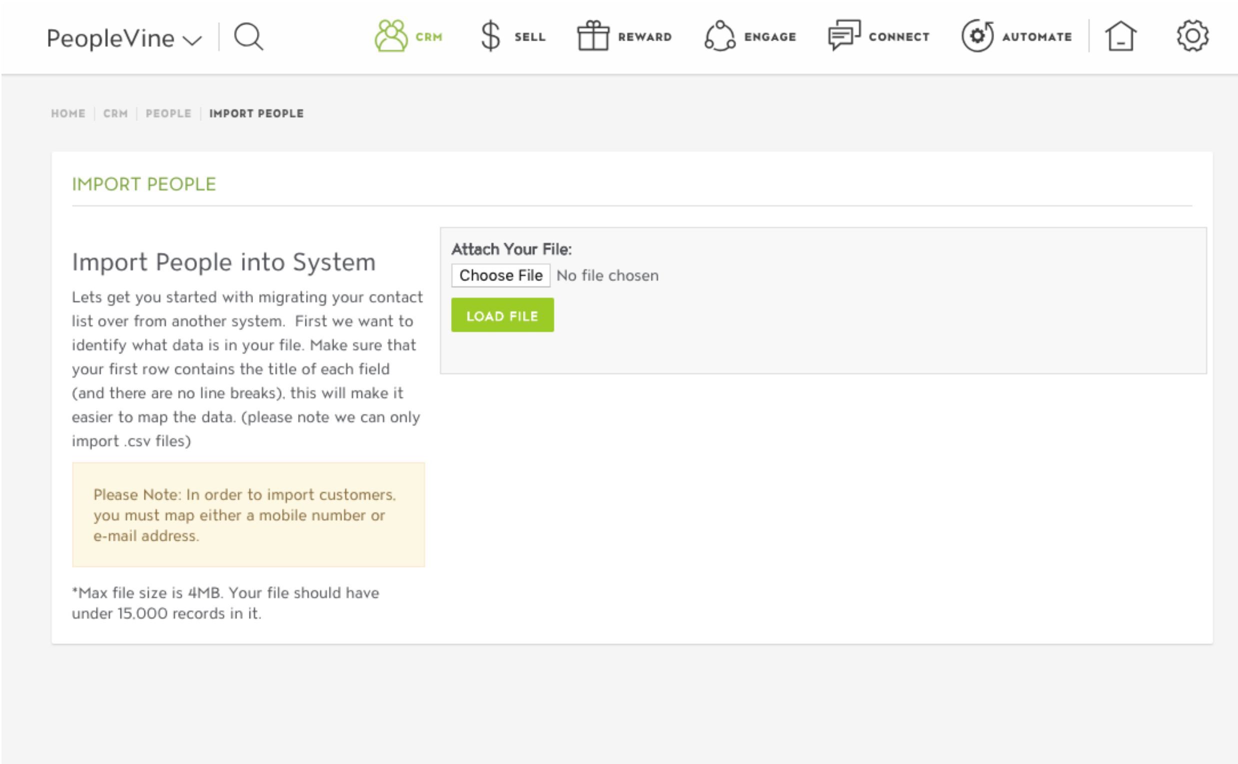
	A	B	C	D	E
1	First Name	Last Name	Email	Company	Mobile Number
2	John	Smith	jsmith@company.com	XYZ	555-123-4567
3	Jane	Doe	jdoe@company.com	ZYX	312-555-1234
4					
5					
6					
7					

Import Contacts into PeopleVine

Once logged into PeopleVine, navigate to the control panel by clicking the ⚙ cog icon on the right hand side.



Select Import Customers under Settings and Tools.

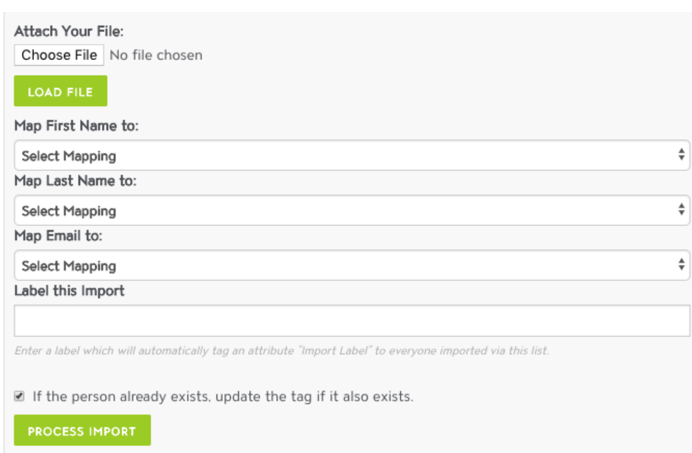


From this screen choose a .CSV file of customers you would like to import and select **'Load File'**

We will now display all the headers from Row 1 and display the ability to map your data to PeopleVine CRM.

A few things you should know: Mapping is used to attach the data to a CRM record. **You must map either email address or mobile number** (or nothing will import). If we find an existing email address or mobile number, we'll update their data to prevent duplicate records.

**Choose an Import Label if you would like to segment this group with an Import Label Attribute



Once everything is mapped, click **Process Import**.

We will send you an email confirmation when the import is complete.

Managing Your Members + CRM

PeopleVine is known for its robust Membership Management and the data we capture back to the CRM record. With over 60 out of the box experiences in PeopleVine, you can capture more data across more interactions than any other platform (even combined). Every time a member, prospective member or customer engages with you, that interaction and all the touchpoints before and after will be tied to one CRM profile.

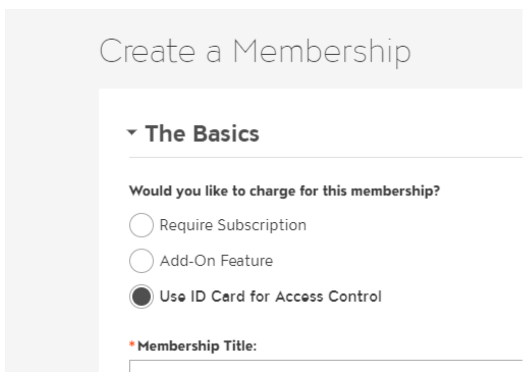
The PeopleVine Membership engine is comprised of both the Membership Program and the Billable Service associated with it. This enables you to control access to your digital and physical space through automated billing or simply set expiration dates for ID cards and all access is lost when it expires.

Managing Membership Programs and Applications

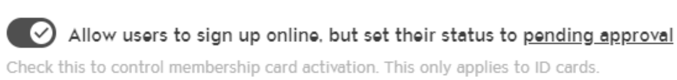
Membership programs can be broken down into a few key elements:

Issuing ID Cards and Access Controls

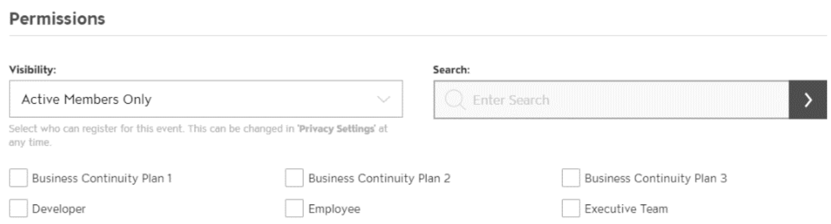
You can create digital ID Cards to control access to both digital and physical spaces that sit directly on the user's mobile device. To setup a Membership Program for ID cards, simply select the **Use ID Card for Access Control** when configuring the membership program.



Please note, there is no gating factor for anyone to sign up for ID cards, so we suggest adding an Application, disabling self-service sign up or checking the box that sets them to pending approval.



Now that the Membership Program is setup, you can now utilize this membership program as a gating factor to different experiences by setting the visibility to Active Members and selecting the appropriate membership.   You will find this option available throughout the create/edit screens in the platform.

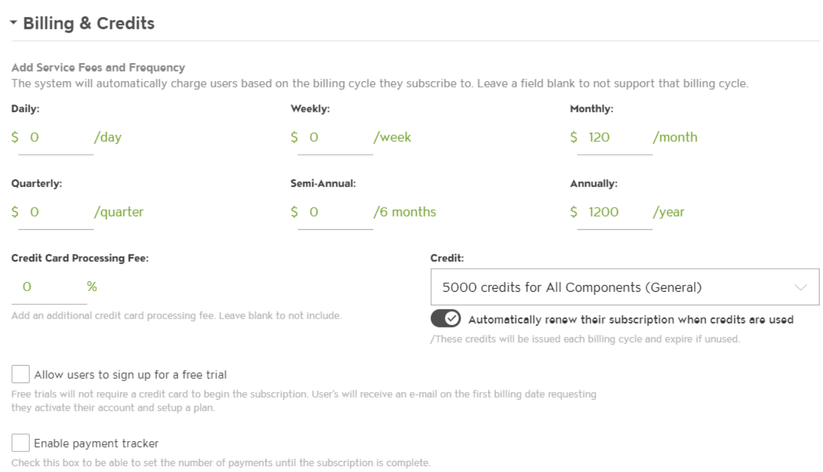


Available at: https://control.peoplevine.com/memberships

Setup Subscription Based Memberships

Alternatively, you can setup the gating factor for a membership to be a recurring billing subscription, meaning they must pay for it to stay active. This can also be gated with an application and full-service sign up. When setting up the membership program simply select **Require Subscription** and we'll walk you through the flow.

You'll be able to set the available pricing, self-service options available and more.



Available at: https://control.peoplevine.com/memberships

Require an Approved Application

You can gate your membership signup with an Application. You can setup a customized multi-step application that enables you to capture basic and/or detailed information about your members before signing up. Once the application is submitted (and they pay the application fee – if applicable), you will have the ability to approve or deny members (along with other status updates).

Upon approval, PeopleVine will automatically setup their membership and associated billing.

Available at: https://control.peoplevine.com/survey/groups

Issue Member Perks

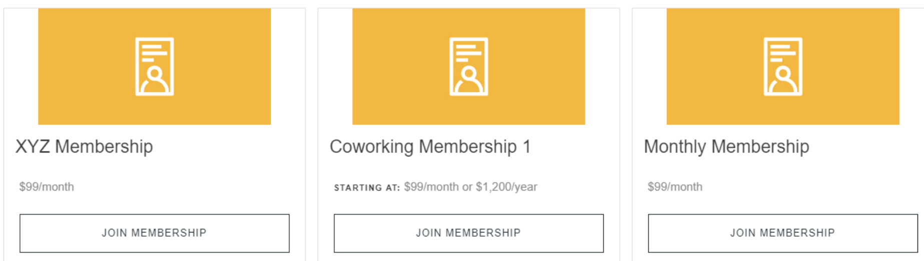
When setting up your membership, you will see a section called **Automatically Issue Member Perks.** This feature can be used to automatically issue gift certificates, vouchers, offers and more when someone becomes a member and/or their membership renews. To start this process, simply click **Manage Member Perks** on the membership program's main menu.

Self-Service Sign Up vs. Full-Service Sign Up

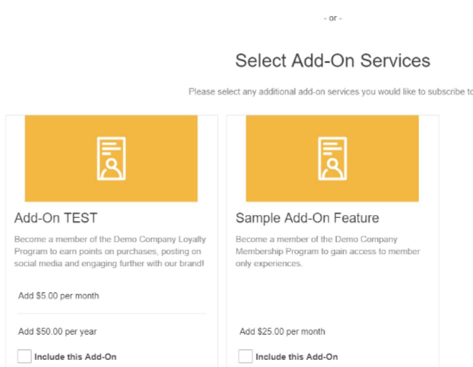
We recommend enabling the self-service option for signing up as it will streamline your operations from first inquiry to becoming an active member.

Self-Service Enrollment

In the self-service flow, users can sign up by visiting https://yoursite.com/memberships where they can choose the appropriate membership plan.



Once they've selected their membership, the system will automatically flow them to the application, select an add-on (if available) or direct to the payment screen. This ensures a quick and easy checkout for the member.



Once they've completed the checkout, they will be taken to the member portal and can actively access member only experiences.

Full-Service Enrollment

When selecting **Full-Service** as the membership sign up process, you can enroll a member by following these steps:

1. Go to Rewards > Membership > Enroll a Member
2. Select the membership program or service you would like to enroll them in
3. Find the CRM record of the person you'd like to enroll (or register a new person)
4. Complete their member profile and continue to payment
5. Take the payment to setup this membership
   Please note that when taking a credit card, ACH or Invoice as payment, the system will automatically charge the member each billing cycle. Any other option (e.g. cash, check, entry) will only apply the payment to the first billing cycle but will prompt the user to enter their payment details upon failing.
6. Upon a completed payment both their membership and subscription will be active.

Please note that steps 4 and 5 are flipped when selecting to subscribe to a service first.

Accessing the Member Portal

The Member Portal provides for a convenient way for your members and people to self-service. Your member portal and membership level can provide access to over 25 screens to help them manage their billing, download their digital ID, track purchase history and so much more; designed to streamline touchpoints with your members.

A member will automatically have access to the Member Portal as long as they are in active status, otherwise the permissions settings will prevent inactive members from gaining access to secured experiences.

Inviting Members to the Member Portal

Depending on how your members enrolled/applied, there may be a different flow for each experience.

- If your members enrolled via direct sign-up, then they already have an account, they can just login at https://yoursite.com/account with the user/password they enrolled with.
- If you had your members complete an application but did not prompt them for a password, you will need to send them a welcome e-mail with Enable Auto Login enabled that routes them to https://yoursite.com/account/edit so they can change their password and confirm their profile.
- If you enrolled your members directly, then follow the previous step to send them an Enable Auto Login e-mail to /account/edit

Available Self-Service Experiences

Once your members are in the Member Portal, they will have access to the experiences you enable and/or they interact with. Below is an inventory of pages which enable your members to manage their account and experiences.

My Account	Account Preferences + Password	Digital Membership Card

/account	/account/edit	/account/memberships
The main screen for your members when they login to their account. The out of the box page will display relevant info when they engage with a specific experience (e.g. event tickets or a reservation).	Your members can update their account profile, preferences and password. In addition, you can attach a custom form to modify their preferences. This is the same place we take them when clicking “update preferences” on a newsletter.	This will take the member directly to their enrolled memberships where they can download their digital card and check-in.

Subscription Billing	**Event Tickets**	**Digital Vouchers**
/account/subscriptions	/account/events	/account/vouchers
This is where people can come manage their subscriptions, manage billing and see past transactions.	People can access tickets, calendar invites and cancel via the portal.	Your members can track their available vouchers and see redemption steps.

Upcoming Bookings	**Order History**	**Digital Offers**
/account/bookings	/account/orders	/account/offers
Includes both reservations, appointments as well as event registrations.	Your customers can view their past orders, print receipts and even re-order with a click.	Allow your customers and members to see their accepted offers and redeem them.

Gift Card/Digital Currency	**Open Invoices**	**Transaction History**
/account/giftcards	/account/invoices	/account/transactions
Allow your gift card/digital currency holders to manage their balance and get transparency on how it was used.	Send your members to their open invoices to ensure they get paid in two-clicks.	Every monetary transaction is available with details on what was billed, the price, taxes and more. They can even download a PDF.

Payment On File	**Loyalty Program**	**Affiliate Dashboard**
/account/paymentonfile	/account/loyalty	/account/affiliates
Where your customers and members can manage their payment information including their payment method at the POS.	Your members can manage their loyalty account by seeing recent activity, points earned and start earning more points.	Allow your affiliates to track their referrals and get the share links.

Member Directory	**Favorites**
/account/member/directory	/account/favorites
Provide a controlled environment for your members to find common interests and	Allow your people to manage their favorites for one-click

connect. Permission levels prevent people from being seen in certain levels.	access to what they're interested in.

Tracking and Managing Members

PeopleVine Memberships can track any time a member checks-in at your space by one of the following methods:

Scan the QR Code

If you enabled the option to **Validate Automatically Once Scanned**, you can utilize any QR code reader to scan and check-in a member. When doing this, it will provide you with a success or failed confirmation depending on their status.

Use the PeopleVine Venue App

You can simply check in a member by scanning their QR code or when using this app, their barcode on their member ID. If they don't have their member ID with them, the Venue App allows you to look them up either by CRM or by membership type, at which time you can check them in.

Use the PeopleVine POX (Point of eXperience) App

Simply look up a member by name, phone number, email or any other info you know about them and tap to validate. Or like the Venue App, you can check them in by scanning their QR code, bar code or swiping a physical card too. Also, when you login with a user associated with that location, we'll track every check-in to the specified location.

Use the PeopleVine Control Panel

For the most flexibility in hardware and experience, you can use the PeopleVine Control Panel to check people in using 2D Barcode Readers (similar to Target or Starbucks), using a key fob reader, swiping a card and even more advanced technologies like face scan or fingerprint.

Available at: https://control.peoplevine.com/membership/check-in

Viewing Member Check-In Activity

Within the Control Panel and the Pox app you have the ability to see who's in your space in real time based on check-ins. In the control panel go to recent check-ins under membership (https://control.peoplevine.com/admin_membership_card_activity.aspx). In the Control Panel you can also run a report to see the frequency of visits over a period of time by clicking on Activity Report under memberships.

Billing and Account Management

PeopleVine Subscriptions are designed to automatically block access upon a failed payment, while sending out an e-mail to re-activate their account. This can also be setup with follow through campaigns that will automatically follow-up until their account is activated.

Self-Service Management

Members can manage their subscription and billing via the member portal where they can see past charges, update their payment on file and manage their preferences.

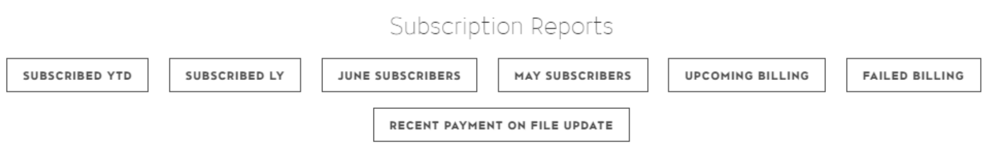
Available at: https://yourcompany.com/account/subscriptions

Subscription Activity and Reports

For starters, make sure you've subscribed to the daily report for all activity associated with membership billing. You'll get a daily report of recent subscriptions, modifications, cancellations and charges.

Available at:
https://control.peoplevine.com/admin_track_create.aspx?reference_type=service&reference_no=0&awaiting_action=batch

You can also see live reports by going to either the Subscription Report or View Subscriptions. Here you'll find links to standard reports, can adjust filters and page through your growing list of subscribers.



Available at: https://control.peoplevine.com/admin_subscriptions.aspx or https://control.peoplevine.com/subscription/report

In addition, all subscription data is exportable to Excel for further processing.

Capture Data to Build Profiles

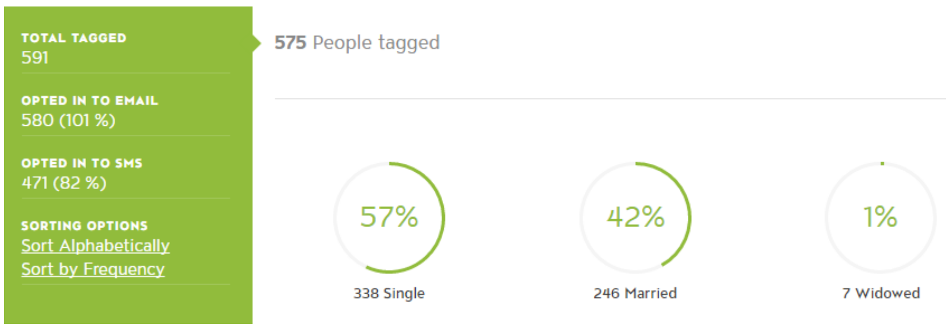
Having the most amount of data is helpful but having it organized and structured can help you act on it. With PeopleVine Forms, you can capture data through almost any experience in PeopleVine and then automatically segment the data into groups.

Customer attributes are the best way to segment your list, add new custom fields to their profile and automate campaigns. They allow you to capture any type of data and automatically attach it to a customer's profile.

There are 3 ways customer attributes can be assigned:

- You can add them manually by going to their CRM profile and click on Tag Attribute. You can select from existing attributes and assign custom values to segment them.
- Attributes can be tagged when a form is completed. You can setup a new form element and map it to Tag as Attribute. Once that occurs, the CRM record will automatically have this tagged on them.
- You can import existing tags by simply adding a new column to your CSV as the tag's name, then adding the value in each row. This will then attach to the customer to further segment your list.

Now that you have these attributes tagged to the CRM profile, you can leverage them to:

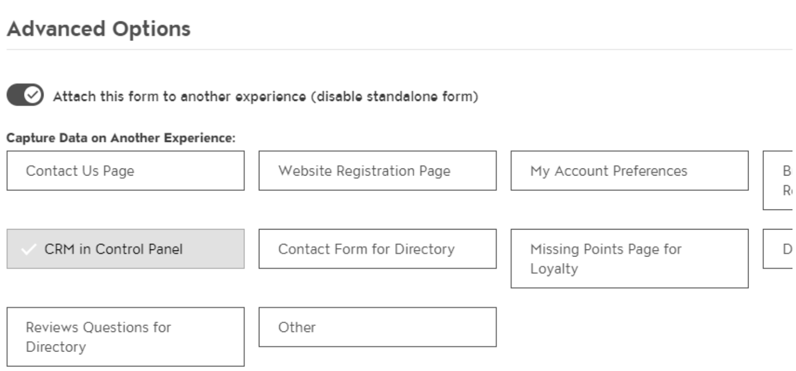


- Segment your users into groups
- Combine attributes to build filtered down lists
- Kick-off campaigns to automate your marketing workflow
- Send newsletters and text messages direct to tagged people

Setup CRM Profiles and Account Preferences

Capturing the right data when people are added to your database or maintaining their profile is key to the most relevant marketing. Within PeopleVine, you can setup both an account preferences form and a CRM form that will prompt people or your employees to enter the specific data points when adding or editing the CRM record.

First you will need to setup the form by going to Engage > Forms > New Form. While setting up, make sure you select Attach this form to another experience. You can then choose either CRM in Control Panel or My Account Preferences (but we recommend you setup both).



Then add the questions you'd like answered. We recommend you keep these to checkboxes, radio buttons and drop downs, as this would allow you to segment into groups and even kick-off automated campaigns.

Communicate with Your Audience

You can easily communicate with your audience via e-mail and SMS text messages and target your audience based on any touchpoint they've had with you or any data segment/grouping that you've setup.

Send E-Mail Newsletters

To send an e-mail newsletter, go to Connect > Email > Compose Newsletter. We recommend you utilize the builder, but you can provide HTML or other elements to send it.

Available at:
https://control.peoplevine.com/newsletters?message_type=email&newsletter_type=marketing

Best Practices

When sending an e-mail, we recommend you complete the following items:

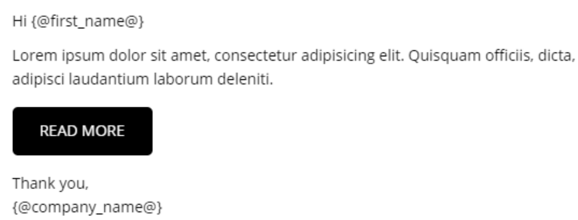
- Preview Text is designed to show up when your email pops up on the users' screen. Keep it short, sweet and concise to get their attention, as there's a lot more inside you want them to read.
- Sending and Replying Address should be the address associated with the sender's function (e.g. membership or events). You can add additional senders by going to Manage Users and request to "send on behalf of"

Using the Builder

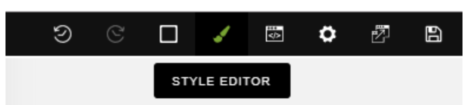
Once your settings are in place, you can continue to build the newsletter in the Builder. Here you will find a list of snippets that can easily be dropped into your e-mail. There are even some HAPI enabled snippets that will auto-load the data.

Simply **double click a snippet** on the left-side and it will be added to your e-mail. You can also **drag and drop** it to your e-mail as well.

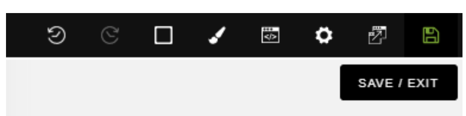
Once added, your snippet is ready to be edited by **double clicking on the text, image or link** you want to edit.



You can stylize your e-mail by clicking on the paintbrush icon, click on the element you want to edit (select multiple by holding the shift key) and then editing the available elements.

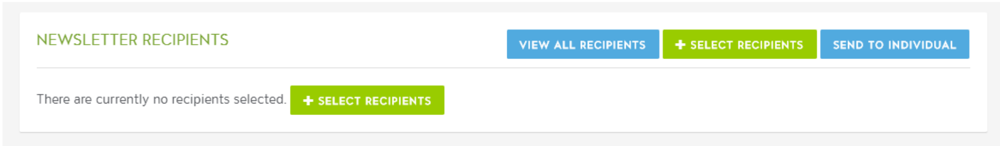


When you're e-mail looks perfect, you can click on the Save Icon and Save and Exit.

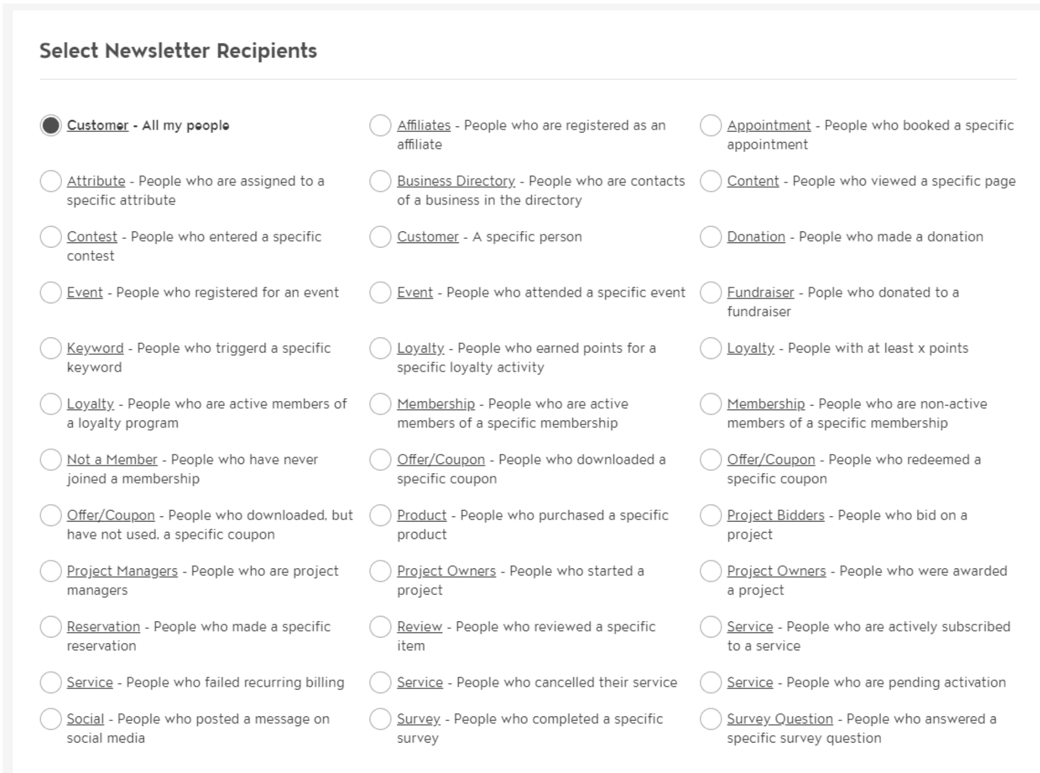


Selecting Your Recipients

Now select the people you want to send to by clicking on Select Recipients.



You can select people who have engaged with you in over 35 different ways to really segment your targeted audience.

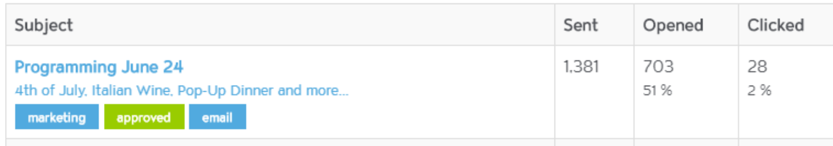


Scheduling Your Newsletter to Send Out

Your newsletter can be scheduled to go out now (keep in mind we kick off sending every 15 minutes), set to go out later or it can be scheduled to go out on a recurring basis. We recommend you leveraging this “scheduled to go out on a recurring basis” feature as a way to keep people informed on upcoming events or recent blog posts. With our HAPI elements and by setting up account preferences, you can automate keeping your members/subscribers informed.

Tracking Opens, Clicks and Opt-Outs

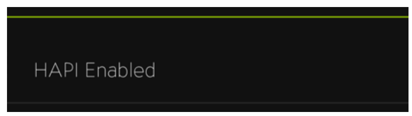
As people receive your e-mails, open it, click on it or click on unsubscribe, you’ll see that data live under your newsletter statistics.



Subject	Sent	Opened	Clicked
Programming June 24 4th of July, Italian Wine, Pop-Up Dinner and more... marketing approved email	1,381	703 51 %	28 2 %

Leverage a Template that Uses HAPI to Load Information

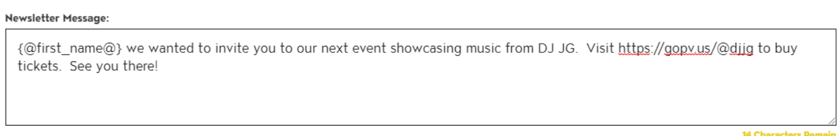
When using the builder and selecting your default layout (v2), you will see a section called HAPI Enabled which will contain snippets that will automatically load your data directly on the page. For example if you were to choose the template that has upcoming events, it will automatically populate the next 10 events that are coming up when that e-mail sends out.



By enabling a HAPI Enabled snippet along with a recurring e-mail, you can automatically keep your members engaged without doing anything more than adding the event to your calendar (once).

Send Text Message Newsletters

Sending text messages newsletters is identical to sending E-mail newsletters, however you won't be using the builder, but instead are limited to 160 characters for your message.



We do not provide real-time tracking on opens, clicks or opt outs for text message newsletters. However, you can setup a keyword under Automate that can handle auto-replies.

Available at: https://control.peoplevine.com/newsletters?message_type=sms

Setup Automation for Continuous Engagement

You can leverage our Campaign Engine and Keyword Engines to create continuous engagement that is designed to auto-reply. Additional resources on setting this up can be found at https://help.peoplevine.com.

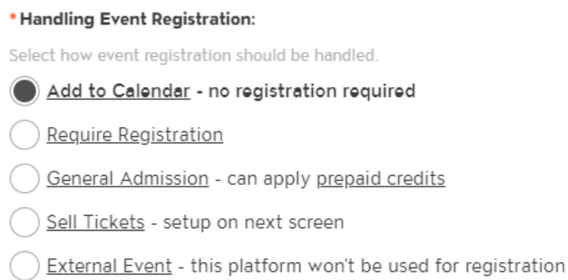
Engage in Your Space

PeopleVine provides infinite ways to engage with your audience by combining touchpoints into multi-step activities, where you can provide badges and reward your members for on-going and time-related engagement. Or if you're not into rewarding, you can create a single place for all member engagement at events, space bookings and more.

Host Events and Ticketing

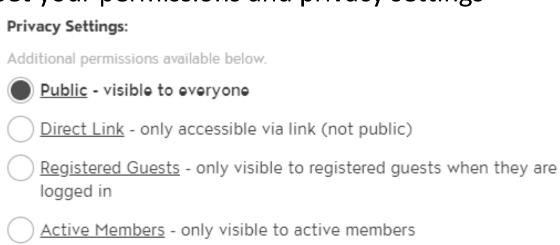
With PeopleVine Events you can setup a calendar of events to showcase your membership programming. These events can be setup to be member only, ticketed with different pricing for members vs. public and so much more. To setup an event follow these steps:

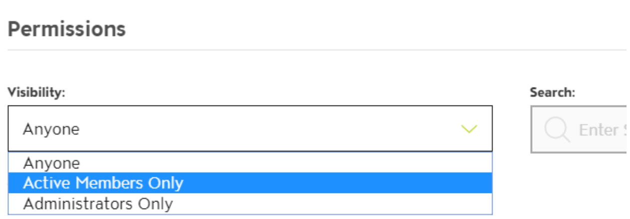
1. Login to the PeopleVine Control Panel
2. Go to Sell > Events > New Event
3. Add the required fields and check out the available options to customize the experience
4. Set the type of event you'd like to launch



    a. When selecting Sell Tickets, you will have the ability to setup the different ticketing options. This would include on-sale/off-sale dates, pricing, quantity available, permissions (e.g. member only), passcodes and more.

5. Set your permissions and privacy settings





Please note that the Privacy Settings are different than Permissions. Permissions prevent someone from being able to book it, unless they have the right permissions. Where Privacy Settings are designed to hide it from being seen on your site unless meeting the requirements.

Once your event is setup, you will see a live guest list.

Available at: https://control.peoplevine.com/events

Manage the Guest List + Check-In

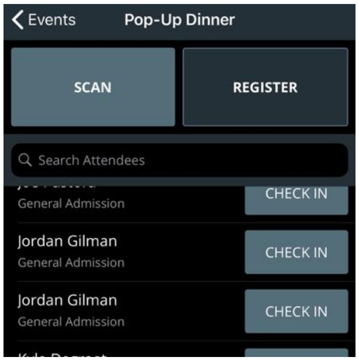
As people register for the event or purchase tickets, your guest list will build automatically in alphabetical order on the event menu. You can also see a list of event attendees in the PeopleVine Venue App. Please note that events only show up in the app 24 hours before event start to avoid checking people into the wrong event.

Once a member has arrived at the event, you can check them in by either:

- Scanning the QR code on their ticket (print or digital)
- Look them up on the guest list and click Check In. This can be done on both the PeopleVine Venue App and the Control Panel.

Using the PeopleVine Venue App to Check-In Attendees

The PeopleVine Venue App is the best way to scan digital tickets and/or look up guests to check them in. See the tutorial above about the Venue App to download and start using for your event check-ins.



*Please Note that events are only visible in the app within 24 hours before the event starts.

Payments and Refunds

When selling tickets for an event, we will capture the funds at that point in time. However, in the event the customer wants to cancel their tickets (whether allowing them to do self-service or you do in the backend), the system will automatically refund the payment for the tickets and cancel them.

Book a Room, Table or a Car

With PeopleVine Appointments and PeopleVine Reservations, you can manage bookings for just about anything, enabling self-service for your members with approved access. This can become an additional stream of revenue as you're able to charge per appointment or reservation time slot.

PeopleVine Appointments

PeopleVine Appointment schedulers are designed to allow your members or people to book a specific appointment slot. This is best utilized for lessons, spa appointments, mentors, but can also support multiple bookings for the same slot to be used for classes.

Appointment schedulers can also be managed by a 3rd party partner who would have limited access to see their upcoming appointments, get a calendar invite when booked and add additional times.

Available at: https://control.peoplevine.com/schedulers?schedule_type=appointment

PeopleVine Reservations

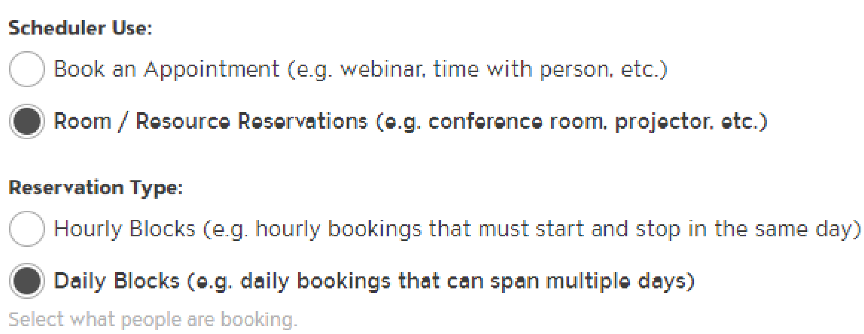
PeopleVine Reservations schedulers are best used for booking a multiple slot booking such as booking a room, renting a car, reserving a table and more. When using categories, you can allow people to see available across multiple bookable elements to choose the right time.

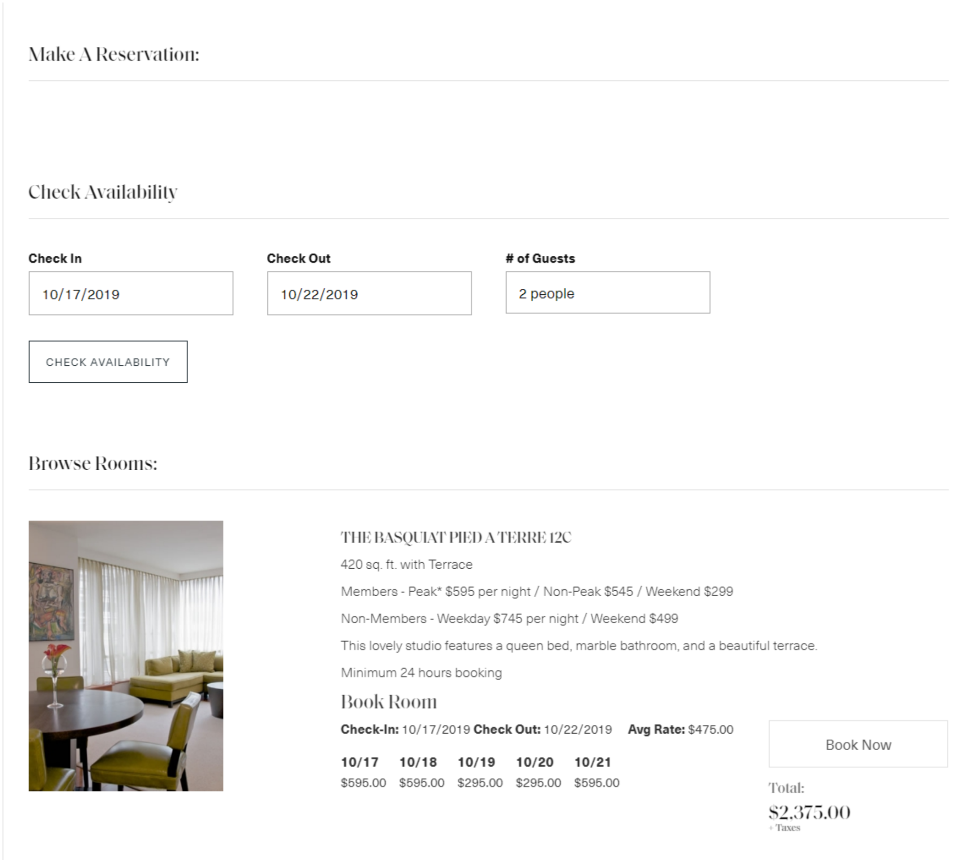
Available at: https://control.peoplevine.com/schedulers?schedule_type=reservation

PeopleVine Reservations for Hotel Rooms + Suites

By leveraging our custom (HAPI) UI, you can leverage our reservations engine to reserve a hotel room across multiple days. Leveraging the slot rules, you can also configure specific pricing and availability based on membership level and timeframe. For example, you can set a schedule of peak and non-peak hours along with different rates on weekends.

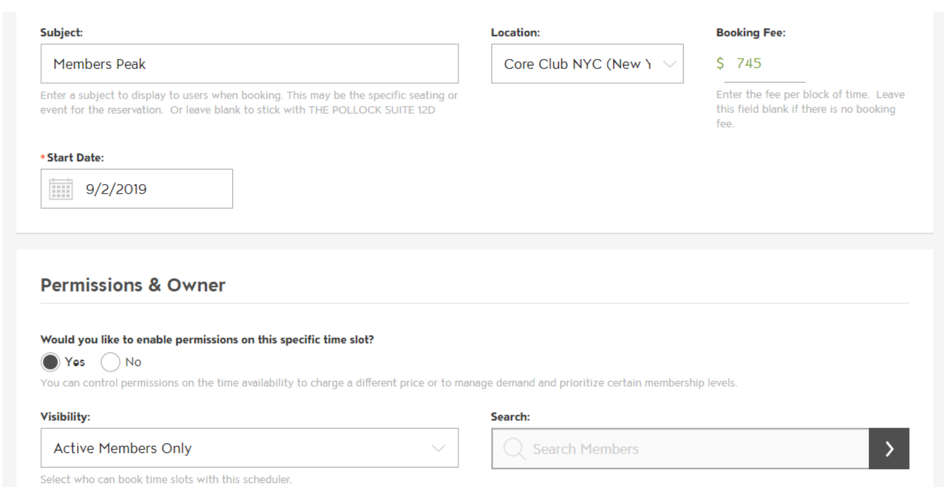
PeopleVine Schedulers supports booking "daily blocks" which will pull up a new scheduler written entirely in HAPI (yes you can replace it).



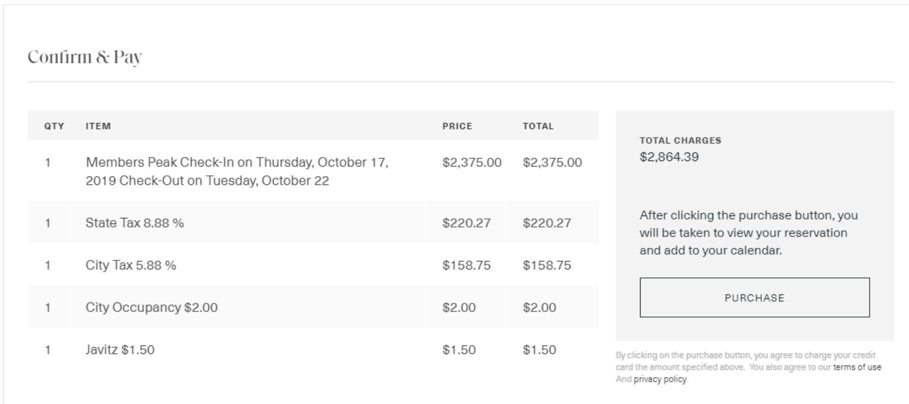


The page is designed to include key elements from the scheduler settings including the graphic, general text, title, etc. as well as provide a break-down of the cost per night when booking.

If you notice the breakout of the rate per day, you'll notice different pricing on different days. This is based on our updated availability rules engine that allows you to have overlapping rules, but with different dates and start times. They can even be assigned to specific membership types or general public to provide a different rate based on their level.



Lastly, you can even setup different tax rules that will display as separate line items for full transparency and tracking.



These features combined togther allows you to truly manage every element of your space, while leveraging our best-in-class membership management to control pricing and availability for your specific membership levels. Imagine the possibilities (if you can't, I can rattle some off on a webinar).

Reward for Loyalty

Some people will engage because they're loyal, while others need to be rewarded. You can leverage PeopleVine Loyalty and Rewards to either track their loyal behaviors (with weighted values) or make it visible to them (that you're tracking their behaviors) and give them badges and either points or an offer. The loyalty engine is designed to track over 65 different activities with a combination of options to create infinite possibilities.

Setup a Loyalty Activity to Earn Points

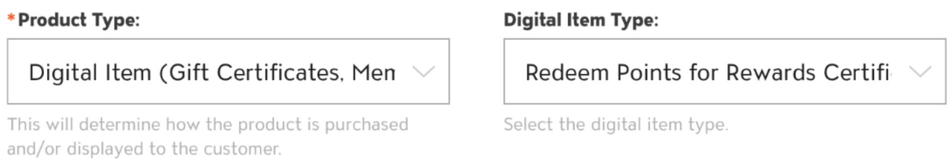
To setup an activity, go to Reward > Loyalty > Setup New Activity. Here you'll be able to setup a rewards activity that is either based on a single activity or a combination of steps. Multi-step activities provide the ability to track specific behaviors and trends within your ecosystem, however you can provide additional level of requirements to ensure people don't go stale:

- Limit the amount of times someone can earn this reward
    - Even break it down to limit once per hour, day, week, month or year
- Limit certain activities to certain levels
- Reach new levels by visiting multiple locations or earning x amount of points
- Associate the activity with a category of products
- Require the multiple steps to be completed within a specific time frame
- Set activities to start and finish on specific dates

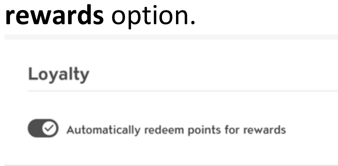
Redeeming Points for Reward Certificates

You can either allow your loyalty members to cash in their points for a specific rewards dollar value or you can automatically issue them a certificate as soon as they reach your point threshold. Depending on how you want to engage with your loyalty members, you an configure either path by following these steps:

1) First you need to setup the e-commerce products that they will use to redeem their points for.
2) Go to Sell > Commerce > New Product and create a new Digital Item to Redeem Points.



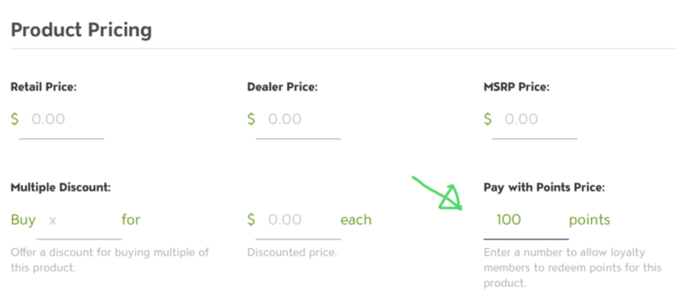
3) Next enter the dollar amount the reward certificate is for and then scroll down to enter how many points the certificate will cost.
4) If you are allowing your members to choose their own redemption value, you can create additional products.
5) To setup auto redeem, go to Platform Settings and select the **Automatically redeem points for rewards** option.



Now your members will automatically earn digital reward certificates (added to their balance) upon achieving the threshold points that you entered. Alternatively, if you don't select "automatically redeem" your members can go to **/shop/loyalty** to shop all loyalty point based rewards.

Redeeming Points for Products in the Marketplace

If you would like for your members to purchase products with points, you can simply set the **Pay with Points Price** which will automatically enable this product in the loyalty marketplace.



Once you've added your first product with the pay with points price enabled, your loyalty members can start to purchase and redeem their points by going to **/shop/loyalty** on your website.

Redeeming Coupons, Offers + Vouchers

If you issue a digital coupon/offer/voucher when someone earns rewards, they will automatically have access to this at **/account/coupons** or **/account/vouchers**. You can then simply scan the QR code to redeem, tap the "Redeem button" or you can leverage the PeopleVine Venue App to lookup and redeem.

Selling Your Merchandise on eCommerce

Want to sell your branded swag or your bottled secret recipe? Simply add your products, services and digital items to PeopleVine Commerce to begin selling online. As soon as you add your first product (and merchant processor) you can start selling at https://yoursite.com/shop along with https://yoursite.com/cart and https://yoursite.com/checkout for links to get you through eCommerce online.

You can also add items to your eCommerce that are only available for checkout by your staff in the Control Panel by using the Virtual POS. In addition, with our Quickbooks integration, your orders and each product on the order are synced directly with Quickbooks inventory (when matching SKUs).

Setting Up eCommerce

There are a few things you need to configure before selling online. Please ensure you've set these up:

Payment Processor

A payment processor is required to accept payments online, however it is not required to use the Virtual POS.

Available at https://control.peoplevine.com/admin_processors.aspx

Shipping in Commerce Settings

You can quickly enable your preferred carrier(s): USPS, UPS or FedEx or enter your own custom shipping options.

Available at https://control.peoplevine.com/commerce_settings.aspx

Taxes and Destinations

Also in the Commerce Settings you can select the countries you ship to along with the taxes you charge per state. You can also set specific taxes for a product (when in edit mode).

Available at https://control.peoplevine.com/commerce_settings.aspx

Categories and Attributes

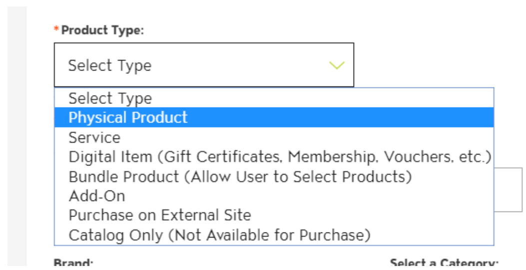
It's important to ensure your data is properly classified. You can group products together either via categories (quick custom landing pages available at /shop/#) or via attributes (which allows you to drill down certain criteria).

Categories available at https://control.peoplevine.com/admin_categories.aspx and **attributes available at** https://control.peoplevine.com/admin_attributes.aspx

Adding a Product

You can either add products one-by-one or you can import via a spreadsheet, your choice. For starters, if you want to add a product quickly (just a few to try), go to Sell > Commerce and Setup New Product.

Depending on the type of product you select, the options and control may vary for you and your customers. Below are the types of products you can setup:



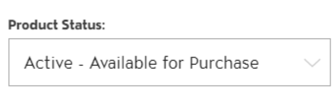
- **Physical Product** is for products that sit on a shelf and are either shipped or physically handed to the customer.
- **Service** products are not calculated as part of shipping, therefore it will bypass the shipping screen if only services are in the cart.
- **Digital Item**s are used to automatically distribute gift certificates, memberships or vouchers upon successful purchase. This allows someone else to gift these items or (for vouchers) to buy them in bulk for a discount.
- **Bundle Product**s allow you to combine multiple items into a packaged deal, requiring the user to select certain products or from certain categories.
- **Add-On** is typically used to be used as suggestive products and are simpler in its capabilities.
- **Purchase on External Site** is used only when you can't sell the product in PeopleVine Commerce and need an easy way for people to get to the product.
- **Catalog Only** products are not available for purchase and allow people to calculate the price when purchasing in bulk. At that point they can add to their favorites or call you for a quote.

When setting up your product(s), try to add as much detail as possible. PeopleVine Commerce can track real-time inventory, product and category based sales stats, member based pricing and so much more!

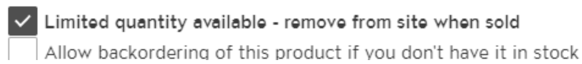
Available at: https://control.peoplevine.com/commerce_product_create.aspx

Shopping Online

Simply set the product status to **Active – Available for Purchase** and as long as there's inventory (or you allow backorders), people can purchase this item.



If you have limited quantity and don't want people to purchase this item after your inventory is exhausted, simply add your inventory and check the box **Limited quantity available** which will automatically remove from your site when the last one is sold.



Your people can purchase any product visible on your site by visiting the product directly or searching at https://yoursite.com/shop. You can also segment your products into categories and attributes for further refinement.

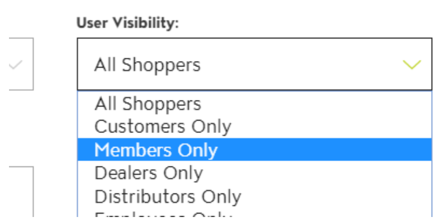
Checkout with the Virtual POS

The Virtual POS is designed to take orders from your customers either on-site or over the phone. It can be used to generate an invoice for payment or take payment on the spot. When getting started with the Virtual POS, you will be prompted to select the person you're checking out. We recommend you select or register the actual customer to track spend, save their cart and even add it to their basket for checkout.

Available at: https://control.peoplevine.com/pos

Member Based Pricing

When viewing the product's menu, you can click on Add New Price or View All Pricing to add a new price. When adding this price, ensure you set the **User Visibility** to Members Only which will automatically show this price (if the lowest) to active members in the selected group (or leave all unchecked for all).



Please note that PeopleVine pricing ONLY works on your eCommerce website or Virtual POS in the Control Panel. It does NOT work with your restaurant POS.

Enable Partners to Do More ****NEW****

Your partners now have .

Reciprocal Clubs****NEW****

With PeopleVine Events you can setup a calendar of events to showcase your membership programming. These events can be setup to be member only, ticketed with different pricing for members vs. public and so much more. To setup an event follow these steps:

Check-In On-Site****NEW****

With PeopleVine Events you can setup a calendar of events to showcase your membership programming. These events can be setup to be member only, ticketed with different pricing for members vs. public and so much more. To setup an event follow these steps:

F&B Operators with Integrated POS

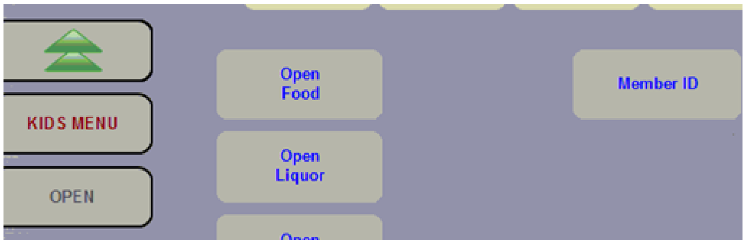
When integrating your Point of Sale to PeopleVine for member tracking, loyalty and rewards or to enable new payment options, there are a few key things we recommend you be aware of. For the most updated information on integrating the POS, please see this help tutorial: http://help.peoplevine.com/articles/3024583-pos-integration-aloha-overview-for-member-experience-card-on-file-house-credits-loyalty-and-more

Using Card on File or House Credits at POS

Now that your POS is integrated through Omnivore, you can enable the ability for your members to pay with Card on File or House Credits (a digital wallet to store funds for spending on online experiences and at the POS).

Process Card on File Payment at the POS

1. Login to the Aloha POS Terminal.
2. Find the Member ID button (this may be located in an OPEN, MISC or similar area).

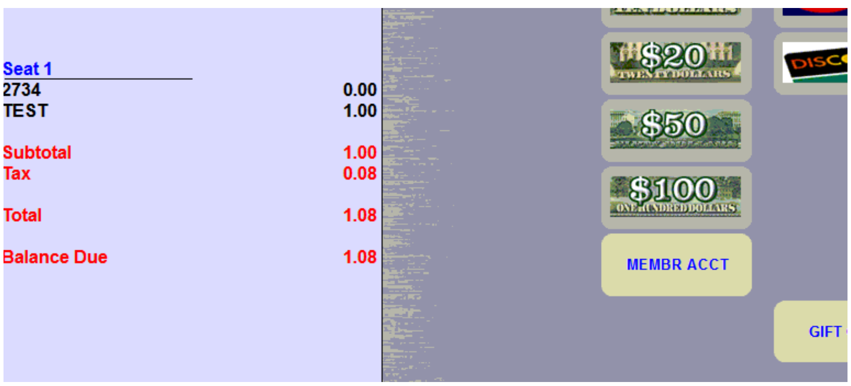


3. Enter their Member ID and hit OK (you do not need to enter a price).

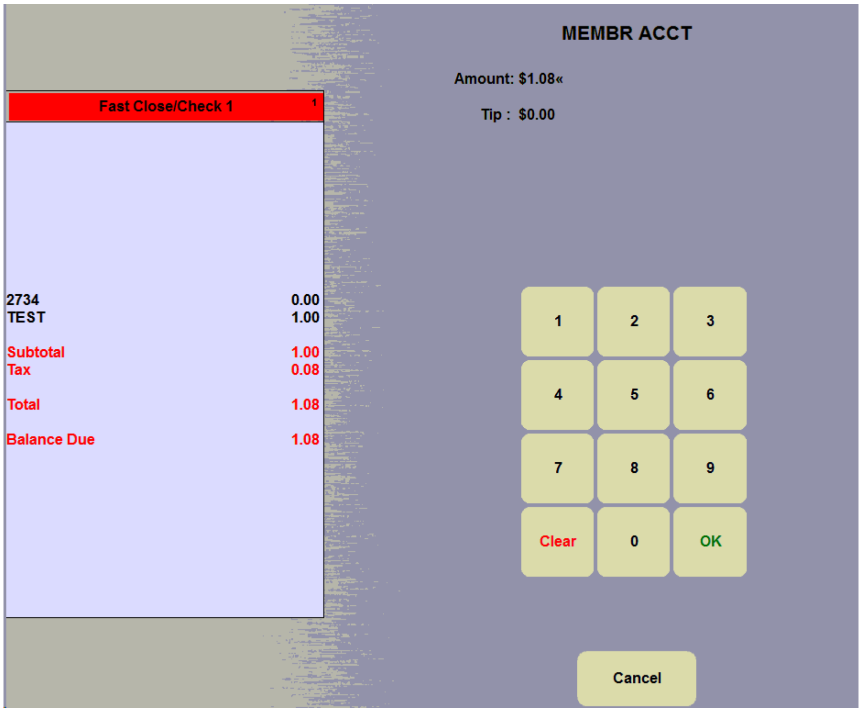
4. Continue to add the items they'd like to order and process everything until payment. When you are ready for payment, follow these steps:

5. Click on the Close button to bring up the payment options.

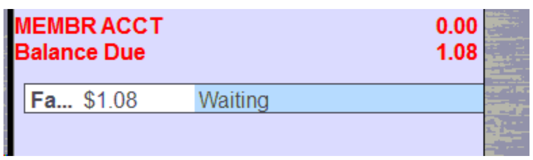
6. Look for the payment called Member Acct (or you may have labeled it Card on File, Payment on File, etc.), so please confirm with your configurator.



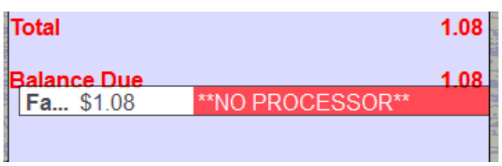
7. Enter the amount and tip to charge them (tip can be added later too – see below).



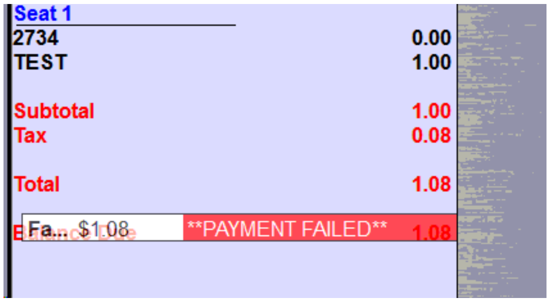
8. Upon hitting OK and entering the payment, you will see a prompt “Waiting.” Please wait until you see one of the following:



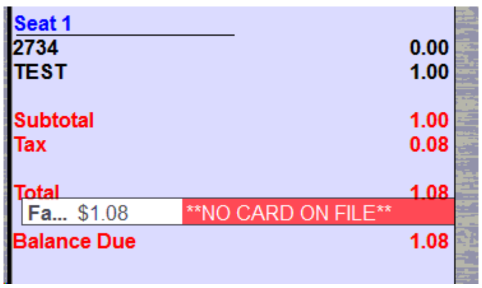
   a. If you see “**No Processor**” please make sure you have configured a payment processor in PeopleVine.



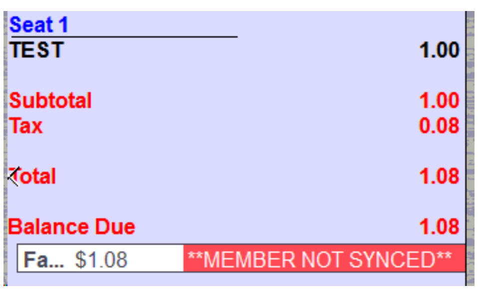
   b. If you see “**Payment Failed**” then there was an issue processing their payment and they will need to update their credit card/payment on file. An admin can view the Transaction log (and click See All) to see the issue in detail.



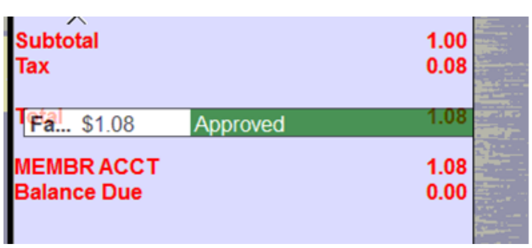
c. If you see “**No Card on File**” the member needs to login to the member portal and add a payment method on file. This shows up instantly upon adding it.



d. If you see “**Member Not Synced**” either the member number was not added to the check, it has not synced or there was an issue with the data provided. Please confirm that the member’s ID was added to the correct menu item and then exit out of the screen and wait at least 30 seconds before trying again.



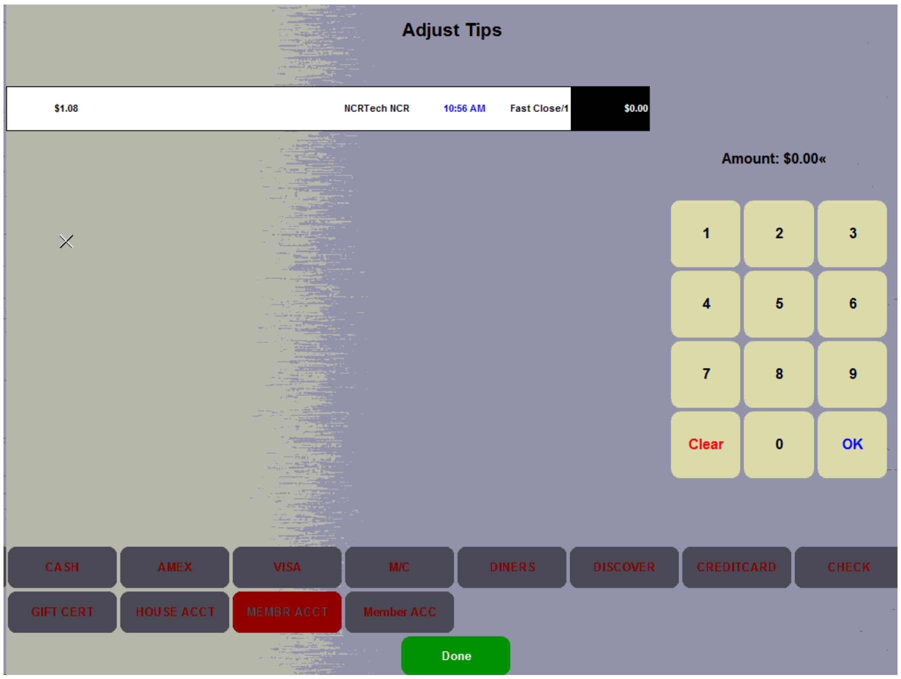
e. When you see “Approved”, the payment is processed and updated on screen.



9. When an order is processed, it will auto close and/or print a chit receipt based on your settings in Aloha (on the Tender ID). But as soon as you see Approved, the system has successfully

authorized the payment (fund will be captured the next morning). You can click Close to finish.

10. If you want to add a tip, click on Adjust Tips in Aloha, click on the ticket and enter the new amount. Upon syncing this tip, the platform will close out the payment and charge it in full, otherwise it will charge the next morning in a batch process (with or without a tip)



Issuing House Credits

House Credits are a digital currency that allows your customers and members to spend their credits on things such as events, bookings, etc. via your website and of course for F&B at the POS. In the PeopleVine platform we currently refer to them as Gift Certificates, which is our digital currency. Gift Certificates can be sold, automatically issued when a member subscribes and on their membership anniversary, in addition rewarded when they earn x loyalty points.

To issue a Gift Certificate/Digital Currency, follow these steps:

1. Login to the PeopleVine Control Panel
2. Click on Sell and under Transactions you'll find Gift Certificates
3. Click to Issue a New Gift Certificate
4. You will be prompted to select the person to issue this to or you can register them. Please note that in order to use the digital currency at the POS, the person must either be a member, have their mobile number on file or you can enter an alphanumeric customer reference value.
5. Once you've selected the person, you can enter the amount to issue the digital currency for.

6. Select the payment method to process and issue the digital currency.
7. Once confirmed, the digital currency will be automatically deposited into the gift certificate

Now that the digital currency is issued, you can use this at the POS by clicking on the House Credits button at the POS. You can also see their balance by clicking on the Verify button.

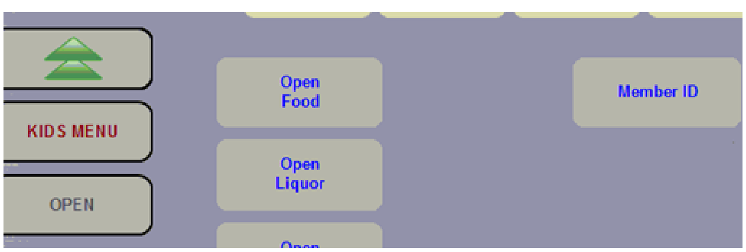
For more information on Gift Certificates, visit this article (http://help.peoplevine.com/articles/1042258-gift-cards-in-peoplevine) or search “gift cards” in our help docs.

Tracking Member Spend at the POS

In order to track member spend, you will need to add their Member ID to the order. When adding this member ID, you do not need to close out with Card on File or other PeopleVine payment methods. If this is on the order at the POS, we can track the order back in PeopleVine and ultimately their spend at the POS (amongst other engagement).

Add Member ID to Order

1. Login to the Aloha POS Terminal.
2. Find the Member ID button (this may be located in an OPEN, MISC or similar area).



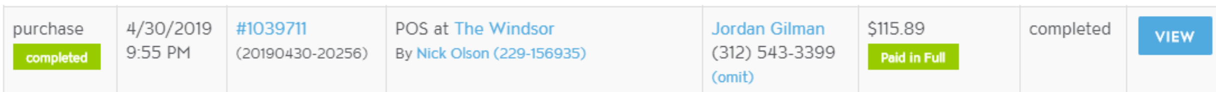
3. Enter their Member ID and hit OK (you do not need to enter a price).

*Note that you can enter their member ID or mobile number (associated with their CRM record) to track the data to their CRM profile. Also, they don't need to be a member to track spend.

Orders sync with PeopleVine every 5 minutes but are instantly synced when you click one of the payment buttons (Verify, Member Card, House Credits, etc.). If we identify a member on the order, we'll start syncing immediately; however, if we don't identify a member, we will only save the transaction when it's closed.

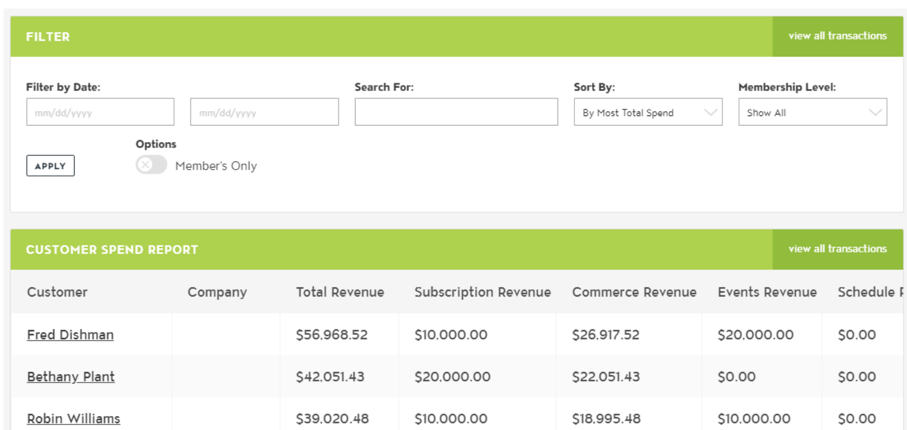
If the Member ID is not provided on the order, we will associate the orders with the Walk-In CRM record.

Once synced, you will see the order under Order History or their CRM profile.



Customer Spend Report

Now that you've tracked the customer spend at the POS, you can view an accumulation of all the money they've spent with you across the POS, event tickets, membership, reservations and more.



Customer	Company	Total Revenue	Subscription Revenue	Commerce Revenue	Events Revenue	Schedule F
Fred Dishman		$56.968.52	$10.000.00	$26.917.52	$20.000.00	$0.00
Bethany Plant		$42.051.43	$20.000.00	$22.051.43	$0.00	$0.00
Robin Williams		$39.020.48	$10.000.00	$18.995.48	$10.000.00	$0.00

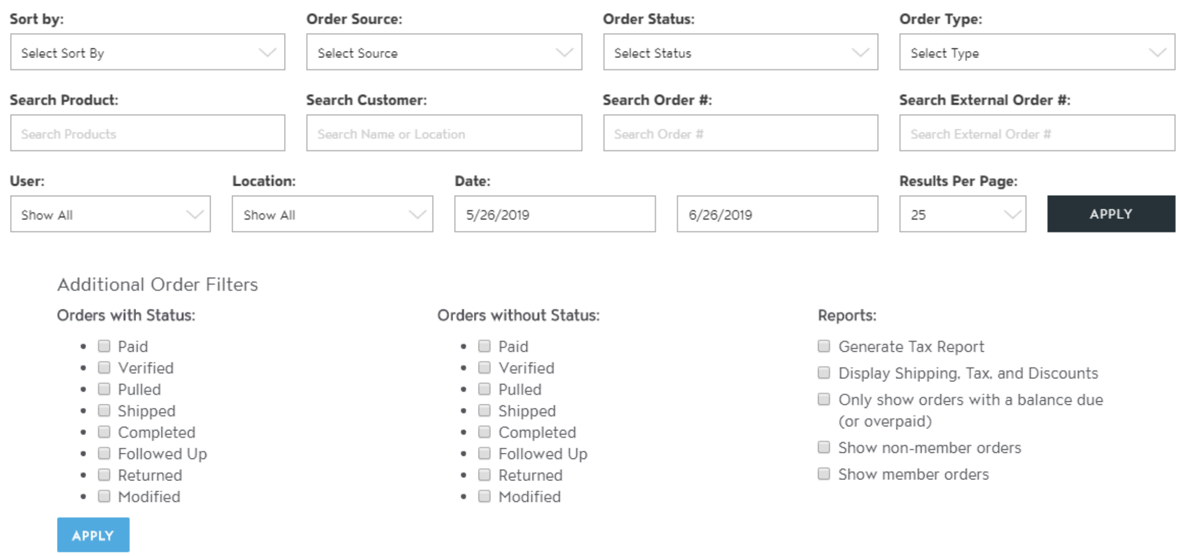
Available at: https://control.peoplevine.com/customer/spend/report

Reviewing Orders and Product Activity in PeopleVine

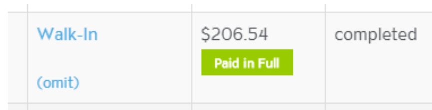
All transactions from the POS flow directly into PeopleVine whether being assigned to a person directly or general data. With this data being available in PeopleVine, you can start to see and build reports on overall activity.

Viewing Order History

To view orders in PeopleVine as they are completed at the POS, go to Sell then View Order History. This will return a live stream of all orders that are either 1) completed or 2) associated with a member/person. You can then start to filter this information via a variety of filters at the top and the bottom.



To view all member related orders and remove all Walk-In orders, simply click the **omit** link next to a Walk-In order.



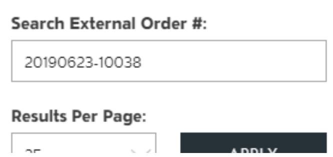
To view all orders that may have missed payment, failed authorization or something else, we suggest first clicking on the **omit** link next to a Walk-In order, then select the **Only show orders with a balance due** under the **Reports:** option towards the bottom. This will help you identify any orders that require attention.

You can also filter orders by **member only** or **non-member** orders to assist with finding relevant data.

Available at: https://control.peoplevine.com/orders

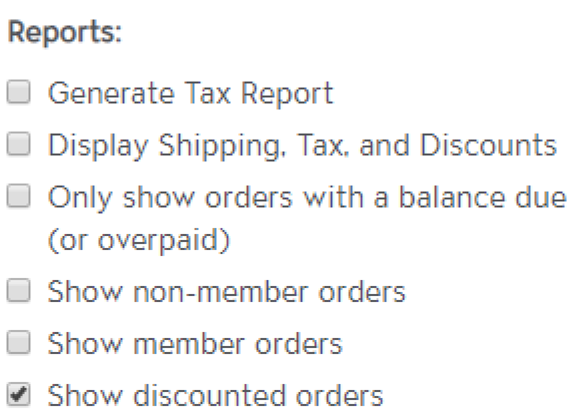
Looking Up an Order

You can lookup an order by going to the order history screen and then searching for an order by External Order #. This number is comprised of the date and the ticket number. For example an order on June 23, 2019 with ticket 10038 would be 20190623-10038. Please note that the same external order # can be used at multiple locations (so you may want to set that filter too).



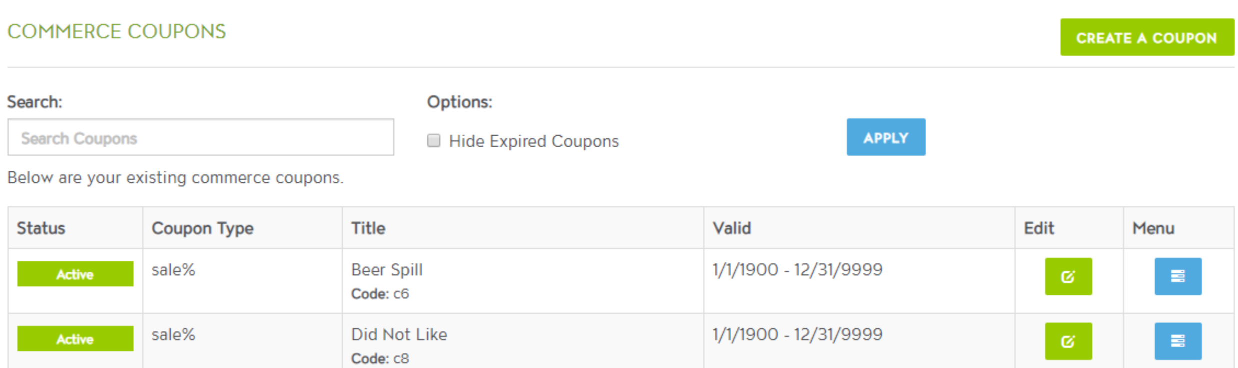
View Discounts on Orders

As orders flow into PeopleVine, we are tracking which discounts were applied at the POS. This allows you to run reports on what your staff is discounting at a high level or granular to the order itself. To find orders that have discounts, you can simply check the **Show discounted orders** option to filter your results to items with a discount.



When clicking on the order, you can see which coupons/discounts were applied to the order right below where the payments info is on the order.

As well, you can get an overview glance of what coupons/discounts are applied by going to the Sell > Commerce menu and clicking on Coupons and Promos. This will list out all the coupon codes available in the platform with the ability to view all the orders associated with it. Please note that changes to these coupons will not update in your POS.



Status	Coupon Type	Title	Valid	Edit	Menu
Active	sale%	Beer Spill Code: c6	1/1/1900 - 12/31/9999		
Active	sale%	Did Not Like Code: c8	1/1/1900 - 12/31/9999		

When clicking on to the menu, you will see a report of who used the coupon, the percentage of the order that was discounted as well as other data to help you perform further analysis.

Coupon Used Here

Below are the orders and transactions this coupon was applied to.

Order #	Date	Type	Customer	Discount	Order Total	View
#1361297 Order	9/27/2019 10:55 PM	order	Walk-In	$7.00 1.40% off	$501.61	VIEW
#1348365 Order	9/21/2019 2:20 AM	order	Walk-In	$10.00 100% off	$0.00	VIEW

Viewing Product Stats

As products are purchased at the POS, we are automatically generating statistics on the sales related to the product. Initially, since we don't pull inventory or cost, the Sales Information will be the most relevant info for you.

We'll provide you with a general snapshot of the average price, total unique customers (please note if you're not 100%-member tracking base, this will include the Walk-in as one person), total revenue, average per order and more.

Sales Statistics

Total Sold	1,778
Total Customers	82
Average/Order	2
Average Price	$12.04
Total Revenue	$21,613.00
Last Sold	6/26/2019
First Sold	12/21/2018

- See all orders with product

Available at: https://control.peoplevine.com/products

Viewing Category Stats

You can generate category based statistics by adding products into the same category (or by syncing your menu from the POS). Upon doing this, you will get a general breakdown of stats related to total sold, revenue generated, average per order, etc.

STATISTICS

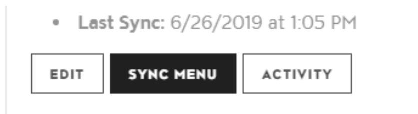
Sales

Total Sold:	1,744
Backorders:	793
Total Revenue:	$15,264.00
Price Range:	$0.00-$2,352.00
Average Price:	$9.90
First Sold Date:	5/22/2019
Last Sold Date:	6/26/2019
Total Customers:	25
Average Per Order:	1.83

Available at: https://control.peoplevine.com/categories

Syncing Your Menu with PeopleVine

In order to pull category stats directly from the POS setup, you will need to sync your menu with PeopleVine. To do this, go to the settings/company menu, click on Integrated Platforms, click on Omnivore, click Sync Menu on the location you'd like to sync.



Available at: https://control.peoplevine.com/admin_authenticate_omnivore.aspx

Accounting and Reports

If you have connected Quickbooks to PeopleVine, we will automatically sync all card on file and house credit payments directly to Quickbooks upon capturing the funds. We do not sync general POS payments.

You can access the Reporting Dashboard for reports covering engagement, revenue, POS, membership and more. You can even build custom reports to export data to csv, view in a table or feed directly to Excel with live data.

Available at: https://control.peoplevine.com/reporting

Handling Exceptions

You may encounter a time where your members data is not syncing properly to PeopleVine. This typically happens when either the back of the house is not properly working (Aloha Transaction Gateway is down) or the payment intercept option on the terminals was removed. This tutorial will help you troubleshoot these issues and get back on track.

Orders Aren't Syncing

Orders sync with PeopleVine every 5 minutes but are instantly synced when you click one of the payment buttons (Verify, Member Card, House Credits). If we identify a member on the order, we'll start syncing immediately; however, if we don't identify a member, we will only save the transaction when it's closed.

If you're not seeing orders show up after a longer period, there may be something wrong on your BoH machine. In this case, we recommend you contact your IT support to ensure the Aloha Transaction Gateway (ATG) is running as well as the iber.exe file. Follow these steps to bring it back up:

1. Login to the Back of the House (BoH) machine
2. Go to the start button and then click on run or press the Windows Key and R
3. Type in services.msc and hit enter

4. Find the NCR Aloha Transaction Gateway Helper service and right click it to start it. This will automatically start the NCR Aloha Transaction Gateway service as well.

As soon as the system is syncing again, all past orders should (depending on version and duration) start syncing to PeopleVine. In some versions, the member ID or rewards number is lost if the system hasn't synced in a day. In this case, you will need to manually assign the order to the individual (using Change Person). At that time, they will be issued their points.

If the orders aren't syncing automatically (this may be due to total volume, storage, etc.), you can still re-sync them from within PeopleVine by going to the Omnivore integration and click next to the location you'd like to sync and then set the dates you'd like to sync. This will the pull back any data into PeopleVine. Please note the member ID may get lost when this happens.

Available at: https://control.peoplevine.com/admin_authenticate_omnivore.aspx

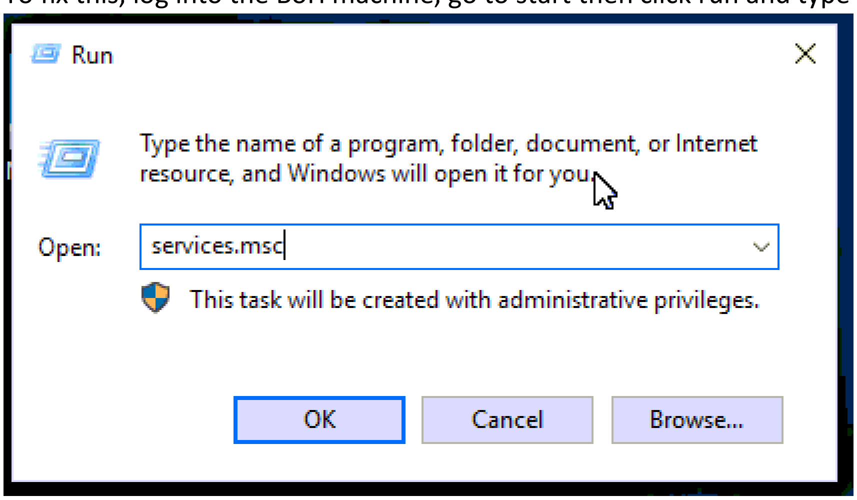
Payments Aren't Syncing

If you are having issues where the Verify button applies a 0.01 payment without verifying, then you need to troubleshoot using the methods below.

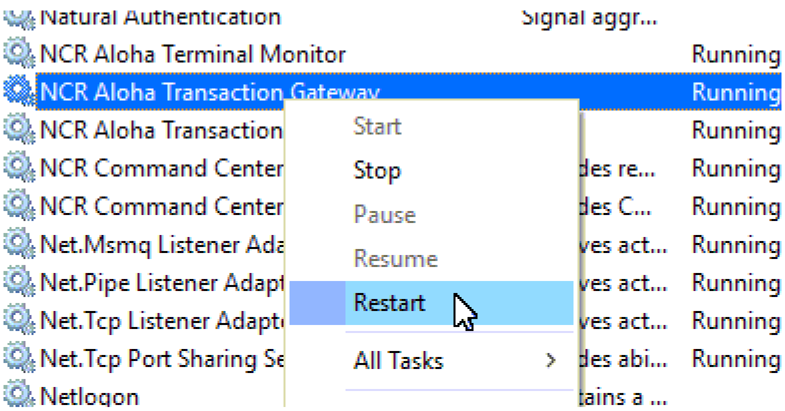
If you are not seeing the "Please Wait", "Approved" or "Declined" message bars when clicking on the payment button, then you will most likely need to have the PeopleVine/Omnivore integration re-installed on the terminal.

Getting Waiting Message Then After Few Minutes it Changes to Error

If it hangs there on the waiting message and doesn't change until you see Error, then your iber is down. To fix this, log into the BoH machine, go to start then click run and type services.msc.



Look for NCR Aloha Transaction Gateway, right click it and click restart.

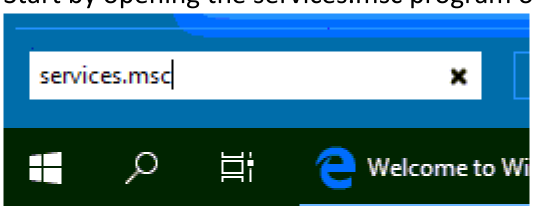


Getting Error Message When Clicking Button

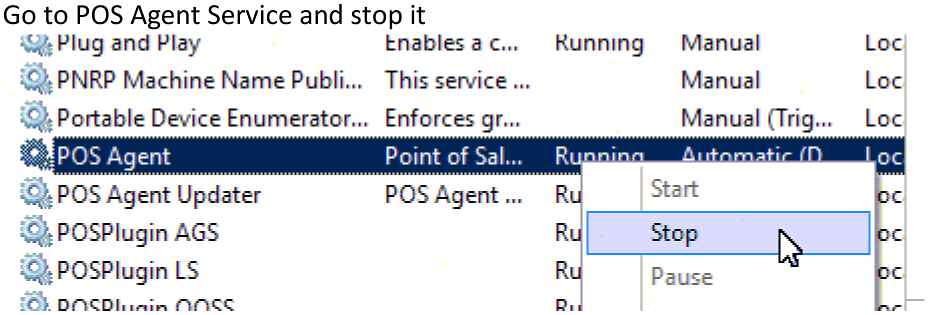
If you immediately see an Error message, please login to a terminal with user 975 and clock in. Once in, click exit and login with your account to check the payments.

Before contacting us, please try these steps on your BoH and terminals:

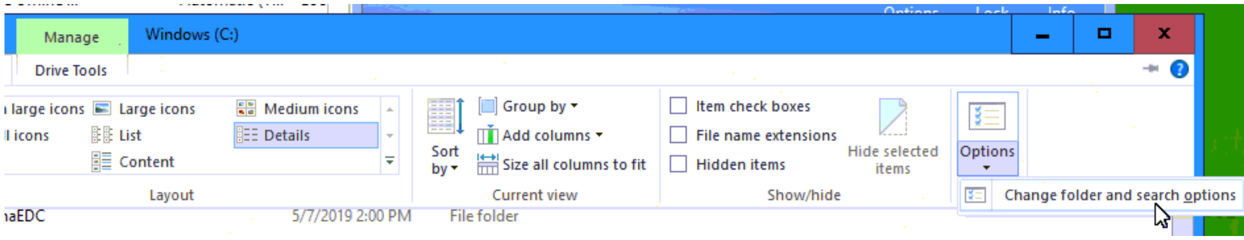
1. Start by opening the services.msc program on the BOH



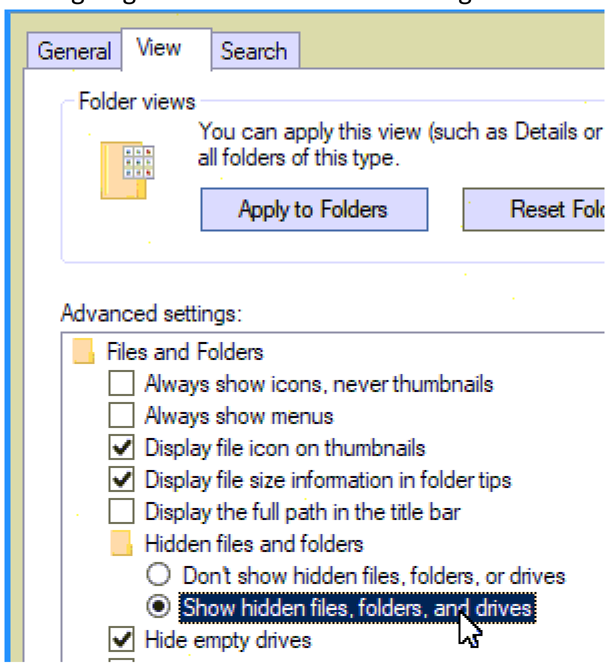
2. Go to POS Agent Service and stop it



3. Go to task manager and you can end the iber.exe tasks or you can execute Taskkill all iber(qs).exe from the command line. Make sure you do this on all terminals too.
4. Delete the file in \ProgramData\pos agent\terminal_integration.db
   a. If you don't see the ProgramData folder, you need to enable hidden files and folders by updating the folder options



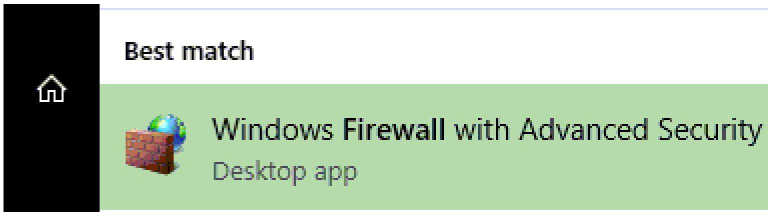
b. Then going to the View tab and clicking on **Show hidden files, folders and drives**.



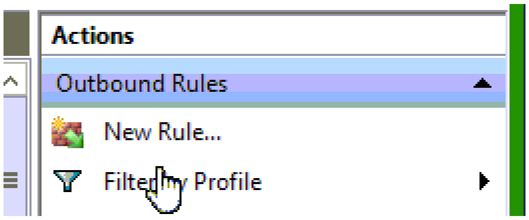
5. Start POS Agent Service.
6. Get all terminals running again with iber(qs).exe (or refresh all machines through Aloha Manager)

If you are having issues with the payment intercept still, you will need to open up the ports on the terminal. Follow these steps to put this in place:

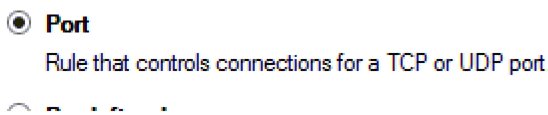
1. Go to the windows menu (you might need a keyboard and click on the windows key) and type in firewall to pull up **Windows Firewall and Advanced Security**



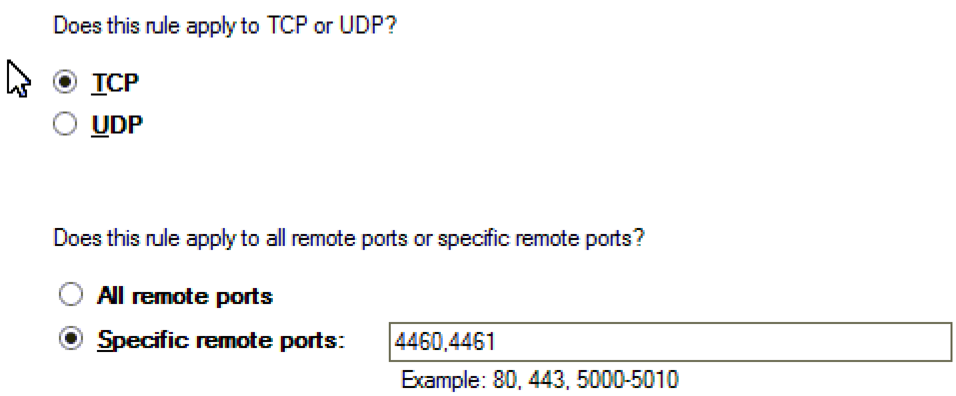
2. Then setup both inbound and outbound rules with the same settings.



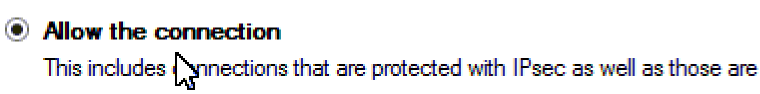
3. Ensuring you are setting up for a **Port**



4. With the following settings for TCP ports 4460, 4461:



5. Make sure you set to **Allow the connection**



If you are still not seeing, please restart this machine or end the task for the terminal and go to Start then Reload Terminal.

If you are still encountering issues or this is a new terminal that was never programmed, please submit a support request at https://peoplevine.com/posdown and we will get it scheduled with Omnivore.

Check logs in C:/windows/pa/log_term1.txt

Open in IE https://alohaboh:4461

If the location is still offline 5 minutes after restarting the Agent service, please contact the Omnivore Outage Line at (800) 293-4058 extension 2.

Additional Troubleshooting Steps

- On the BoH
  - Set these two in the \POS Agent\general.ini
    [Agent]
    DisableProcessCheck = False
    ReadOnly = False
  - Save. Restart POS Agent service.
  - If you need to install the software
    - https://connect.omnivore.io/files
      - Click Omnivore installer
- On the terminal side
  - taskkill /f /IM iber.exe
  - Open an admin command prompt
    - type
      - cd\
      - cd %localdir%\bin
      - omnivore.register.bat
    - confirm
  - reboot with shutdown -r

rinse repeat for all terminals.

If Waiting for ever then get Error do →