



Velti™ mGage™ Marketing Suite

User's Guide

Version 8.0

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About This Guide

This guide is designed to familiarize new users with the Velti™ mGage™ Marketing Suite (MS) interface and functionality, and to serve as a reference for more experienced users.

This guide is organized as follows:

- Introduction to mGage™ Marketing Suite, common terminology, and user roles.
- Overview of the mGage™ MS user interface.
- Setting up and managing marketing campaigns (including interactions and events), and using analytics to track and optimize campaigns.
- Using interaction toolkits to create interaction templates.
- Setting up and managing mobile coupons.

Note: For information about creating short codes and keywords, see the *mGage™ Messaging Administration User's Guide*, and for information about creating organizations (brands, clients, and publishers) or setting up user accounts, see the *mGage™ Admin Tool User's Guide*.

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1 Introduction

Velti mGage™ Marketing Suite (MS) makes it easy for you to build rich interactive experiences with mobile consumers. It provides the tools your organization needs to develop ongoing communications, relationships, and value-generation with consumers, which leads to increased sales. To take full advantage of the targeted reach and flexibility of mobile marketing, you need a way to develop new campaigns quickly and cost-effectively to capture fast-moving audiences and opportunities.

mGage™ MS accelerates your development of interactive campaigns; with an automated process to create interactions and connect them to short codes, you can launch a campaign in minutes.

Key features include:

- **Campaign Management**—Use a comprehensive campaign definition and execution tool to create, implement, and monitor your mobile initiatives. Roll-up status reports and filtering help you zero in on the information you need.
- **Interaction Delivery**—Automate and control your campaign rollout by configuring flight dates, targeting interactions by time zones and countries, and using pause and submit capabilities to deliver an interactive experience for the consumer.
 - **Manage short codes and keywords** with no carrier interaction required.
 - **Support key mobile media** including SMS (with Email, MMS, and WAP push in development for future releases).
- **Toolkit and Storyboard**—Create, preview, manage, and save interactions as storyboard templates. Out-of-the-box interaction toolkits include:
 - **Text-to-win**—Reward and engage consumers with cross-channel campaigns. Users can enter a prize draw to win movie premiere tickets, DVDs, mobile downloads, and more.
 - **Vote-and-poll**—Drive greater engagement through polling campaigns and mobile quiz competitions for instant win prizes.
 - **On pack promotions**—Create and apply redemption programs for on-pack promotions.
 - **Mobile couponing**—Boost sales and consumer loyalty by offering customers mobile coupons to use against future purchases.
- **Analytics and Reporting**—Track and optimize your mobile campaigns with detailed real-time insight. Dashboards and Excel-compatible campaign reports put information at your fingertips.

1.1 Terminology

Table 1 lists important terms and definitions used in this guide.

Table 1 - Terms and Definitions

Term	Definition
Campaign	A group of related interactions and events (marketing activities, for example, text-2-win) with a specific marketing goal.
Entry	A participant who interacts with a campaign's interaction, for example, sends an SMS message or clicks on a banner in response to a poll, is granted an entry. An entry is granted each time the participant interacts with the campaign's interaction. Entries can be used towards draws to win prizes. (Entries are counted per participant.)
Event	A type of activity that, when associated with an interaction, provides additional engagement opportunities and capabilities that have a specific short-term goal, for example, a draw.
Interaction	A set of tactics (consumer inputs and system responses) that outline how a campaign engages with the campaign's targeted consumer.
On-Pack	A type of interaction. For example, an individual texts a unique coupon code, found on product packaging, to a short code in order to participate in competition.
Participant	A participant is a unique individual who interacts one or more times with a campaign's interaction. Once an individual interacts, for example, sends an SMS in response to a poll, the individual becomes a participant. (Participants are counted per interaction.)
Participations	Participations is the sum of all the entries of all the participants for an interaction. (Participations are counted per interaction.)
Vote and Poll	A type of interaction. For example, an individual texts keywords that represent answers to quizzes, voting polls, and trivia competitions to a short code in order to participate and accumulate points.
Send Coupon	A type of interaction. For example, an individual texts a keyword (not unique) to a short code to receive a message which contains a unique coupon code that can be redeemed.
Storyboard	The part of the interaction that outlines, in detail, the set of tactics (consumer inputs and mGage™ system responses) that is used to continually engage the participant.

Term	Definition
Test 2 Win	A type of interaction. For example, an individual texts a keyword to a short code to participate and get points. Points accumulate and can be used to win prizes.

1.2 User Roles

The mGage™ Marketing Suite application includes two pre-defined user roles. Whether or not you can perform an action depends on the user role assigned to your account. You can also create your own user roles. For a list of the pre-defined user roles' permissions, see Table 2 - User Roles on page 9.

Note: See the *mGage™ Admin Tool User's Guide* for information about creating and assigning user roles.

Table 2 - User Roles

Permission	Administrator	Base User
Add Campaign	X	
View Campaign	X	X
Delete Campaign	X	
Add Interaction	X	
View Interaction	X	X
Edit Interaction	X	
Pause Interaction	X	
Cancel Interaction	X	
Reactivate Interaction	X	
Delete Interaction	X	
Add Event	X	
View Event	X	X
Edit Event	X	
Execute Event Draw	X	
Pause Event	X	
Resume Event	X	
Cancel Event	X	
Delete Event	X	
Access Coupon Tab	X	

Access Toolkit features	X
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2 mGage™ Marketing Suite Interface

The mGage™ Marketing Suite (MS) interface is an Adobe Flash application. This section provides an overview of the most common mGage™ MS interface components. The My Campaigns, Toolkit, and Coupon Manager interfaces are described in detail later in this guide. By default, when you open mGage™ MS, the My Campaigns interface is active.

The mGage™ Marketing Suite interface is organized into four main areas:

- **mGage™ MS navigation bar**—To navigate within mGage™ MS and use its various functions, use the application navigation bar at the top of the interface. Your current location is always highlighted (“My Campaigns” in Figure 1). Depending on which option you choose, the left panel and workspace/dashboard sections display different options and information.
- **Left navigation and action panel**—The left panel allows you to perform actions and navigate within the interface you opened via the application navigation bar. The left panel can display both action buttons and panes. When there is more than one pane, the panes are organized in an accordion structure. Each pane has additional action buttons and navigation options.
- **Workspace/dashboard section**—In the middle of the interface, appears a workspace or dashboard where you perform actions and view status information. For example, you can create a campaign, view a report, or edit an interaction. Navigating via the application navigation bar and left panel changes what displays in the workspace/dashboard section. An additional navigation bar, the local navigation bar, displays at the top of the workspace/dashboard section. Use this navigation bar to understand where you are within a process and to return to the interface’s dashboard.
- **Properties panel**—The properties panel displays on the right side of the interface. By default this panel remains closed until you choose to open it. To open the properties panel, select an item from the workspace/dashboard (for example, a campaign or interaction) and then click the properties icon (). To close the properties panel, click the properties icon again.

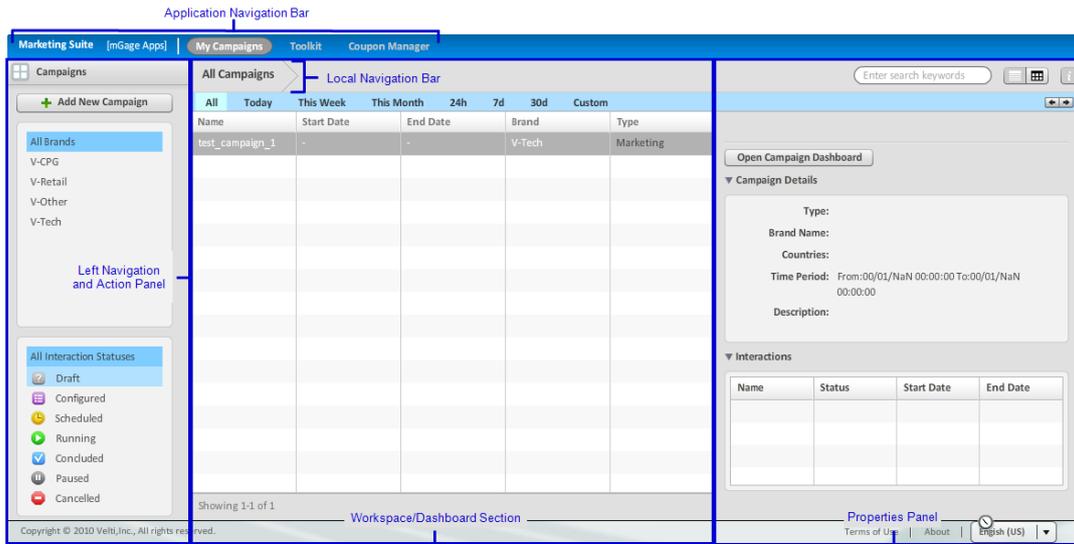


Figure 1 - mGage™ Marketing Suite Interface

2.1 Rules and Guidelines

Use mGage™ MS according to the following guidelines:

- Use any of the following browsers: Microsoft® Internet Explorer® 6, 7, or 8; or Mozilla Firefox® 2 or 3. (Other browsers may work but have not been tested.)
- Browser settings must support secure sessions, enable cookies, and support JavaScript (as required for all mGage™ components).
- Do not use the browser's Back/Forward (Prev/Next) buttons; use the mGage™ MS navigation buttons instead.
- Adobe Flash must be installed on your PC.
- Sort tabular data displays (such as campaigns and interactions) by clicking the column headings.

2.2 Logging Into mGage™ Marketing Suite

To log into mGage™ Marketing Suite:

1. Open a Web browser and enter the URL for the mGage™ portal. (The URL is implementation-specific; contact your system administrator.)

2. Click **Log In**.

The mGage™ login page appears.

3. Enter your username and password and click **Log in**.

The first mGage™ application (to which your user role has access to) on the application pop-up ribbon opens.

4. On the navigation menu bar, click **mGage Apps**.

The mGage™ applications pop-up ribbon appears.



Figure 2 - mGage™ Marketing Suite icon

5. Click on the mGage™ Marketing Suite icon.



Figure 3 - mGage™ Marketing Suite icon

The mGage™ MS home page appears.

Name	Start Date	End Date	Brand	Type
Ford Globa	08/01/2010 03:12:00	08/30/2010 04:40:00	IntQABrandA	Marketing
HTML5.Campain new	-	-	IntQABrandB	Marketing
MerccrediInteraction1	07/21/2010 13:10:00	08/29/2010 00:00:00	IntQABrandA	Marketing
TB725	07/25/2010 00:00:00	08/26/2010 00:00:00	IntQABrandA	Marketing
TB72610	07/26/2010 08:49:00	08/27/2010 00:00:00	IntQABrandA	Marketing
TB727-3	07/27/2010 12:13:00	08/28/2010 00:00:00	IntQABrandA	Marketing
TB727-4	07/27/2010 00:00:00	08/30/2010 00:00:00	IntQABrandA	Marketing
TB727Campaign	07/27/2010 07:00:00	08/28/2010 00:00:00	IntQABrandA	Marketing
TB82	-	-	IntQABrandA	Marketing
Test #2	-	-	IntQABrandB	Marketing
Test K 290710 M	07/30/2010 00:00:00	08/06/2010 00:00:00	IntQABrandA	Marketing
Test K2 280710	07/29/2010 21:00:00	08/30/2010 00:00:00	IntQABrandA	Marketing
TuesCamp1	07/20/2010 09:55:00	08/21/2010 00:00:00	IntQABrandA	Marketing
campaign 1-1	07/20/2010 06:35:00	08/28/2010 18:00:00	IntQABrandA	Marketing
campaign_una_1	07/21/2010 00:00:00	10/30/2010 18:00:00	IntQABrandA	Marketing
demo text2win	-	-	IntQABrandB	Marketing
kinkiriku	-	-	IntQABrandB	Marketing
olegs_campaign	-	-	IntQABrandB	Marketing
tb727-2	07/27/2010 10:45:00	08/28/2010 00:00:00	IntQABrandA	Marketing
tc1	07/19/2010 22:18:00	08/20/2010 00:00:00	IntQABrandA	Marketing

Figure 4 - mGage™ MS home page

Note: After 30 minutes of inactivity, your user session automatically expires. To continue using the mGage™ MS, repeat the login procedure.

2.3 Logging Out of mGage™ Marketing Suite

To log out of mGage™ Marketing Suite:

1. At the top-right corner of the application window, click **Logout**.
mGage™ logs you out and displays mGage™ Login page.

2.4 Changing the Display Language

You can change the language of the labels, prompts, messages, and so on in the mGage™ MS interface.

Note: The supported language is English; additional languages can be added on a customer request basis.

To change the display language:

1. On the bottom-right corner of the application window, click the language drop-down list.



Figure 5 - Language Selection

The list of available languages appears.

2. Select the language you want to display.

The interface refreshes to show the selected language.

2.5 Dates and Time Zones

Date and time zone display and entry formats on the mGage™ MS interface are based on UCT (Coordinated Universal Time) time. This means that if you want to set an interaction or event to run, for example, in Madrid, you must know the time difference between UCT time and Madrid time, and set the start time in UCT time. In other words, to set an interaction to run in Madrid at 08:00 am, as Madrid is UCT+01:00, you set the start time to 07:00 am UCT time.

3 Getting Started

mGage™ MS is a powerful and flexible tool for creating mobile marketing campaigns. To help you become oriented, this section outlines the main steps that you need to perform to create your first campaign with interactions and events. Once you are oriented, you can quickly create more complex, highly engaging campaigns.

To perform day-to-day campaign creation and management tasks, you mostly work through the My Campaigns tab. However, there are some campaign setup tasks that require you to use the Toolkits and Coupon Manager tabs. In addition, you might need to use the mGage™ platform's Messaging Administration component to set up short codes and keywords.

3.1 Preparing to Create a Campaign

Before you create a campaign and add interactions and events, you need to perform some set up tasks.

3.1.1 Set Up a Short Code and Keyword

You need at least one short code and keyword to create an interaction. Short codes and keywords are available through the mGage™ platform's Messaging Administration component. (Your organization might already have some short codes and keywords setup, in which case you can use those.) If you need to set up a new short code or keyword, see the *mGage™ Messaging Administration User's Guide*. You can access the Messaging Administration UI from the mGage™ applications pop-up ribbon; on the application navigation menu bar, click **mGage Apps**, and then click on the Messaging Administration icon.

3.1.2 Create an Interaction Template

The next step is to create an interaction template. (Your organization might already have some interaction templates setup, in which case you can use those.)

When you create an interaction template, you outline a set of engagement tactics that you can customize later for specific campaigns. Creating an interaction template enables you to control and fine tune how consumers will interact with your campaign.

To create an interaction template, you first need to understand how you want consumers to interact with your campaign. Based on your campaign's strategy, you can choose an appropriate interaction toolkit type; Text 2 Win, Vote and Poll, On Pack, or Send Coupon. You also need to know which channels the interaction should run in, which brands will use the interaction template, and whether or not you will be utilizing coupons. You can change this information later; however, once you use the template to create an actual interaction, you cannot edit the template. Once you create an interaction template, you can reuse it in any of your brand's campaigns.

You can create an interaction template from the Toolkits tab. mGage™ MS currently provides four types of interaction toolkits; Text 2 Win, Vote and Poll, On Pack, and Send Coupon. To create an interaction template, see "Creating an Interaction Template," on page 81.

3.1.3 Create Coupons

If you are creating an interaction that will utilize coupons, then you need to set up the coupons before creating an interaction. To create a set of coupons, see “Creating a Coupon Category,” on page 112.

3.2 Creating a Campaign with Interactions and Events

A campaign is a logical unit used to manage related marketing activities. Within a campaign you can create interactions and events, and then view analytics to help you monitor the campaign’s progress.

Interactions are the components that drive the engagement between your campaign and its targeted consumers. Events provide additional opportunities to engage with consumers. For example, you can use a Draw event with prizes to encourage participants to increase their interaction with your campaign.

3.2.1 Create a Campaign

To create a campaign you only need some general information, for example, the campaign name and brand. To create a campaign, see “Creating a Campaign,” on page 24.

3.2.2 Create an Interaction

To create an interaction, you first need to understand how you want consumers to interact with your campaign. Based on your campaign’s strategy, you can choose an appropriate interaction template type; Text 2 Win, Vote and Poll, On Pack, or Send Coupon, and then select a specific interaction template from a list of templates. When you create an interaction, you customize the interaction template with your campaign’s specific interaction details. You need to know which channels the interaction should run in, which country routing and short codes to use, and whether or not you will be utilizing coupons. You cannot change this information once you create the interaction. To create an interaction, see “Adding an Interaction to a Campaign,” on page 35.

3.2.3 Configure the Interaction

Once you have created the interaction, you have two more tasks to perform. You need to set up the interaction’s storyboard and set up the interaction’s schedule, in that order.

The storyboard is the part of the interaction that outlines, in detail, the set of tactics (consumer inputs and mGage™ system responses) that is used to continually engage the participant. After you set up an interaction’s storyboard, you can edit it later. To set up the interaction’s storyboard, on the interaction’s dashboard, click **Configure Storyboard**.

When you set up the interaction’s schedule, you define when the interaction will run, and which keywords will be used with the interaction. You also set up stop and help messages. To set up the interaction’s schedule, on the interaction’s dashboard, click **Schedule and Activation**.

To configure an interaction, see “Configuring an Interaction in a Campaign,” on page 38.

3.2.4 Create an Event

You can enhance an interaction by creating an event, for example, a Draw event, which encourages additional participation, with opportunities to win prizes. Based on your campaign’s strategy, you can choose an appropriate event type; Draw or Instant Win. To create an event, you need at least one interaction. The interaction provides the pool of possible participants for the event. To create an event, see “Adding Campaign Events,” on page 50.

3.3 Monitoring a Campaign

Once your campaign’s interactions are running, you will want to analyze how well the overall campaign and its interactions are performing. You can monitor campaign and interaction performance from the campaign’s Dashboard and Analytics panes.

3.3.1 Monitoring a Campaign’s Performance

Click **My Campaigns**, find your campaign in the campaigns list, and then double-click on the campaign to open its Dashboard pane. The Dashboard pane shows the overall campaign performance. For more information, see “Viewing a Campaign,” on page 30.

3.3.2 Monitoring a Interaction’s Performance

Click **My Campaigns**, find your campaign in the campaigns list, and then double-click on the campaign to open its Dashboard pane. To monitor each interaction’s performance, on the left navigation panel, click **Analytics**. For more information, see “Using the Campaign (Detail) Analytics Pane,” on page 73.

4 My Campaigns

From the My Campaigns tab, you can easily set up and manage your campaigns. First you create a campaign, and then you set up interactions and events to run in your campaign. Later you can track the progress of your campaign in real time.

See “Using the My Campaigns Interface,” on page 23 for the various tasks you can perform using the My Campaigns interface.

4.1 My Campaigns (Overview) Interface

This section describes the My Campaigns interface in detail. See “Using the My Campaigns Interface,” on page 23 for the various tasks you can perform using the My Campaigns interface.

To access the My Campaign functions:

1. From the mGage™ MS application navigation bar, click **My Campaigns**.

The My Campaigns page appears.

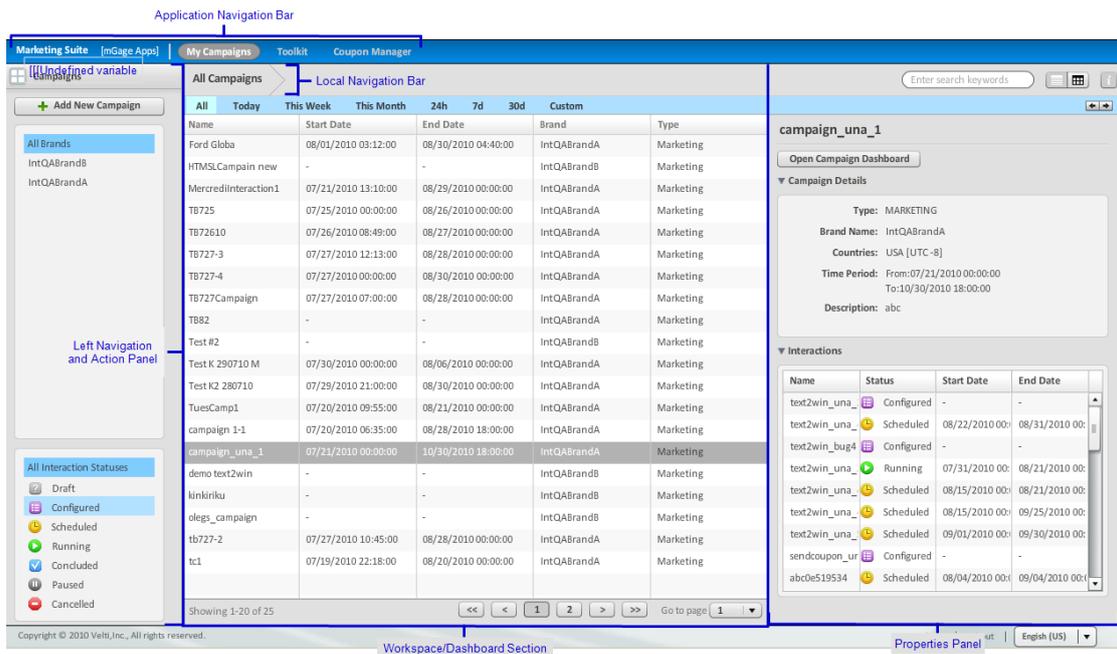


Figure 6 - My Campaigns Interface

The My Campaigns page includes the following sections:

- **mGage™ MS navigation bar**—Displays the current location (**My Campaigns** is highlighted). Clicking on My Campaigns causes the left panel to display campaign action buttons and filtering options. The workspace/dashboard section displays the All Campaigns dashboard.



Figure 7 - mGage™ MS Navigation Bar (My Campaigns)

- **Left navigation and action panel**—Includes three sections; Add New Campaign button, filter by brands, and filter by interaction status.
 - Use the Add New Campaign button to add a new campaign.
 - Use the by brand and by interaction status filters to select which campaigns appear on the All Campaigns dashboard (directly to the right). Brands are user-defined, and which brands you can see depends on your user account. The interaction status filters are Draft, Configured, Scheduled, Running, Concluded, Paused, and Cancelled. (When you use the interaction status filter, it displays only campaigns that include an interaction.) You can select more than one brand or interaction status filter, at the same time, by holding down the Ctrl key and selecting each filter option.

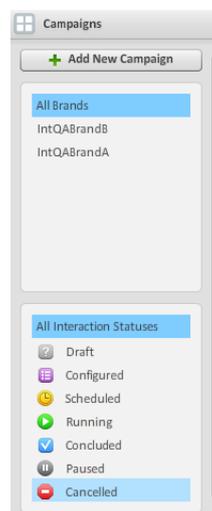
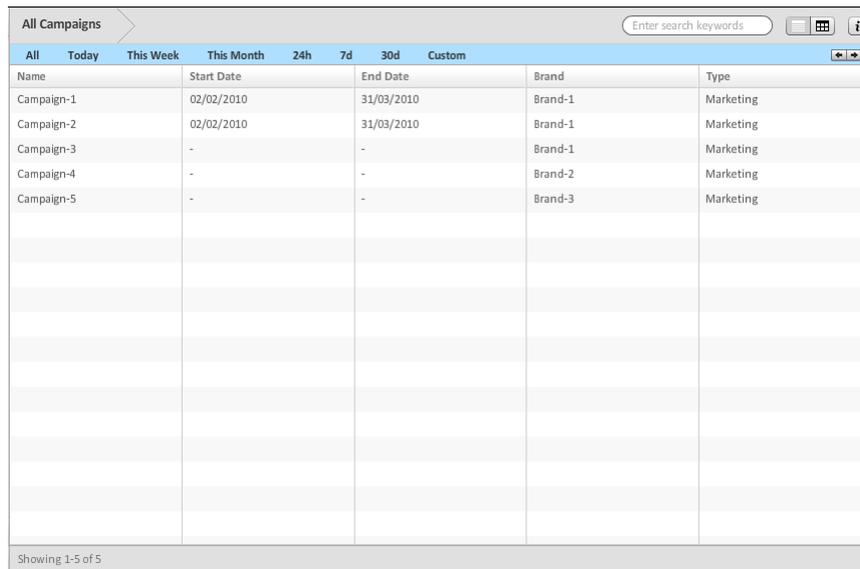


Figure 8 - Left Navigation and Action Panel (My Campaigns)

- **Workspace/dashboard section**—Displays the All Campaigns dashboard, which shows all the existing campaigns.



All Campaigns						Enter search keywords		
All	Today	This Week	This Month	24h	7d	30d	Custom	
Name	Start Date	End Date	Brand	Type				
Campaign-1	02/02/2010	31/03/2010	Brand-1	Marketing				
Campaign-2	02/02/2010	31/03/2010	Brand-1	Marketing				
Campaign-3	-	-	Brand-1	Marketing				
Campaign-4	-	-	Brand-2	Marketing				
Campaign-5	-	-	Brand-3	Marketing				
					Showing 1-5 of 5			

Figure 9 - All Campaigns Dashboard

Local Navigation Bar

An additional navigation bar, the local navigation bar, displays All Campaigns. Use this navigation bar to understand where you are within the My Campaigns process. Click on **All Campaigns**, on the local menu bar, to return to the All Campaigns dashboard at any time.

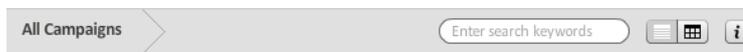


Figure 10 - Local Navigation Bar (My Campaigns)

In addition, to the right of the local navigation bar are several action buttons; search, dashboard display switch, and the properties panel icon.

Time-driven Filtering Options

Directly under the local navigation bar are time-driven filtering options for the All Campaigns dashboard. Filtering options include; All, Today, This Week, This Month, 24 Hours, 7 Days, 30 Days, and Custom. Use these time-driven filtering options to display only campaigns that match a specific time range. These time-driven filtering options are used in conjunction with the by brand and by interaction status filtering options on the left panel. Campaign filtering is based on the campaign's start and end dates.

To the right of the time-driven filtering options are additional filtering options; previous (left arrow icon, ) and next (right arrow icon, ). Click on these icons to display campaigns that match a specific time range's previous or next time range. For example, click **30d** to display all campaigns that match the past 30 days time range. The campaigns for the past 30 days time range display, for example, **From 13 Mar 2010 Till 12 Apr 2010**.

All Campaigns					Enter search keywords	☰	☒	i
All	Today	This Week	This Month	24h	7d	30d	Custom	From 13 Mar 2010 Till 12 Apr 2010
Name	Start Date	End Date	Brand	Type				
Campaign-1	02/02/2010	31/03/2010	Brand-1	Marketing				
Campaign-2	02/02/2010	31/03/2010	Brand-1	Marketing				

Figure 11 - All Campaigns 30d Filtering

Next, click the previous arrow icon (left arrow icon, ) , to display all campaigns that match the previous 30 days to the past 30 days, for example, **From 11 Feb 2010 Till 13 Mar 2010**.

All Campaigns					Enter search keywords	☰	☒	i
All	Today	This Week	This Month	24h	7d	30d	Custom	From 11 Feb 2010 Till 13 Mar 2010
Name	Start Date	End Date	Brand	Type				

Figure 12 - All Campaigns Previous 30d Filtering

All Campaigns List

The All Campaigns list displays all the campaigns that match the chosen filtering options. For each campaign the list displays its Name, Start Date, End Date, Brand, and Type. By default, the campaign list sorts by Name in ascending order. Click on any column heading to sort the list of campaigns by ascending () or descending () order for that criteria. A campaign’s start date is the start date of the earliest interaction associated with the campaign. A campaign’s end date is the end date of the latest interaction associated with the campaign. For example, a campaign has two interactions; interaction 1 which starts on 02/03/2010 and ends on 28/02/2010 and interaction 2 which starts on 08/03/2010 and ends on 31/03/2010. In this case the campaign’s start date is 02/03/2010 and end date is 31/03/2010. If a campaign does not have an interaction associated with it or if there is an interaction but it is in the Draft state (you have not set the interaction run dates yet), then you cannot use the start and end dates to filter the campaign.

All Campaigns					Enter search keywords	☰	☒	i
All	Today	This Week	This Month	24h	7d	30d	Custom	From 13 Mar 2010 Till 12 Apr 2010
Name	Start Date	End Date	Brand	Type				
Campaign-1	02/02/2010	31/03/2010	Brand-1	Marketing				
Campaign-2	02/02/2010	31/03/2010	Brand-1	Marketing				
Campaign-3	-	-	Brand-1	Marketing				
Campaign-4	-	-	Brand-2	Marketing				
Campaign-5	-	-	Brand-3	Marketing				

Figure 13 - All Campaigns Column Headings

From the All Campaigns list, double-click on the campaign to open the Campaign Dashboard for that campaign.

- **Campaign Properties Panel**—The campaign properties panel contains overview campaign detail and campaign interaction information. By default the properties

panel is closed. To open the properties panel, select a campaign, and then click on the properties icon (i). Once the properties panel is open, click on another campaign in the campaign list to display its properties in the properties panel. To close the properties panel, click the properties icon again.

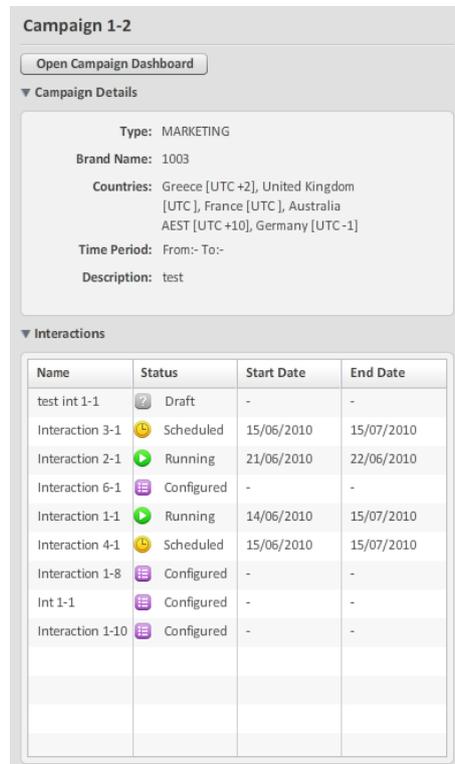


Figure 14 - Campaign Properties Panel

From the campaign properties panel, click **Open Campaign Dashboard** to open the Campaign Dashboard, which displays detailed information about the selected campaign.

- **Page filtering**—At the bottom of the interface appears the total number of campaigns currently listed on the All Campaigns list and several page filtering options. The page filtering options only appear when the All Campaigns list includes more campaigns than can be displayed on one page. The page filtering options are first page (<<), previous page (<), page number (2), next page (>), last page (>>), as well as the Go to page drop-down menu.



Figure 15 - Campaign Properties Panel

4.2 Using the My Campaigns Interface

You can perform the following tasks from the My Campaigns page:

- “Creating a Campaign,” on page 24.
- “Filtering Campaigns on the All Campaigns Dashboard,” on page 24.

4.2.1 Creating a Campaign

The first step in developing a marketing campaign is to create a campaign. A campaign is a logical unit that contains interactions and events. You add interactions and events to the campaign.

To create a campaign:

1. On the mGage™ MS navigation bar, click **My Campaigns**.

The My Campaigns page appears.

2. In the left panel, click **Add New Campaign**.

The Create New Campaign page appears.

3. In the **Name** field, enter a meaningful name for this campaign.
4. (Optional.) In the **External ID** field, enter an external identification number with which you want this campaign to be associated.

The External ID value is user-defined. You can use this field to enter a tracking ID that has meaning within your organization. Typically, you should enter a value that is unique for each campaign. For example, you might want to track campaigns based on a purchase order (PO) number for billing purposes. The External ID appears in reports, and you can export a report and filter it based on your organization's tracking ID values.

5. In the **Description** field, enter a meaningful description for this campaign.
6. From the **Brand** drop-down menu, select the brand to which this campaign is associated. Brands are user defined, and which brands you can see depend on your user account.
7. From the **Type** drop-down menu, select the campaign type for this campaign. The options are:
 - Marketing
8. Click **Create Campaign**.

The Create New Campaign page closes. The newly created campaign displays in the All Campaigns dashboard. (The All Campaigns dashboard remembers the last filtering settings, so you might need to click **All** to see the new campaign.)

9. Next, add one or more interactions and events to the campaign. For more information, see “Adding an Interaction to a Campaign,” on page 35 and “Adding Campaign Events,” on page 50.

4.2.2 Filtering Campaigns on the All Campaigns Dashboard

You can filter which campaigns appear in the All Campaigns dashboard. For example, you can view all existing campaigns, all campaigns for a specific brand, or only campaigns that have interactions with a specific status.

Use the by brand and by interaction status filters to select which campaigns appear on the All Campaigns dashboard (directly to the right). Brands are user defined, and which brands you can see depend on your user account. The interaction status filters are Draft, Configured, Scheduled, Running, Concluded, Paused, and Cancelled. (When you

use the interaction status filter, it displays only campaigns that include an interaction.) You can select more than one brand or interaction status filter, at the same time, by holding down the Ctrl key and selecting each filter option.

To view all campaigns:

1. On the mGage™ MS navigation bar, click **My Campaigns**.

The My Campaigns page opens and displays the All Campaigns list.

2. To view all campaigns do the following:
 - a. Click the **All** time range filter option.
 - b. In the left panel, click **All Brands**.
 - c. In the left panel, click **All Interaction Statuses**.

The All Campaigns list refreshes and displays all existing campaigns.

To view campaigns by brand:

1. On the mGage™ MS navigation bar, click **My Campaigns**.

The My Campaigns page opens and displays the All Campaigns list.

2. In the left panel, choose a brand filter option. The brand options depend on the brands to which your account has access. (You can select more than one brand filter, at the same time, by holding down the Ctrl key and selecting each brand.)

The All Campaigns dashboard refreshes and displays campaigns for the selected brand or brands.

3. On the All Campaigns dashboard, choose a time range filter option.

The All Campaigns dashboard refreshes and displays campaigns for the selected brand in the selected time range.

To view all campaigns by interaction status:

1. On the mGage™ MS navigation bar, click **My Campaigns**.

The My Campaigns page opens and displays the All Campaigns list.

2. In the left panel, choose an interaction status option. (You can select more than one interaction status filter, at the same time, by holding down the Ctrl key and selecting each interaction status.)

The All Campaigns dashboard refreshes and displays campaigns for the selected interaction status or statuses.

3. On the All Campaigns dashboard, choose a time range filter option.

The All Campaigns dashboard refreshes and displays campaigns for the selected interaction status in the selected time range.

To view campaigns by brand and by interaction status:

1. On the mGage™ MS navigation bar, click **My Campaigns**.

The My Campaigns page opens and displays the All Campaigns list.

2. In the left panel, choose a brand filter option, and then select an interaction status.

The All Campaigns dashboard refreshes and displays campaigns for the selected brand and interaction status.

3. On the All Campaigns dashboard, choose a time range filter option.

The All Campaigns dashboard refreshes and displays campaigns for the selected brand and interaction status in the selected time range.

4.3 Campaign (Detail) Interface

This section describes the Campaign detail interface. Use the Campaign detail page to view and manage a specific campaign. You can access all the other Campaign detail panes (Interactions, Events, and Analytics) from the left panel. See “Using the Campaign (Detail) Interface,” on page 27, for the various tasks you can perform using the Campaign detail interface.

To access campaign details:

1. From the mGage™ MS Navigation bar, click **My Campaigns**.

The My Campaigns page appears and displays the All Campaigns list.

2. Filter the All Campaigns dashboard list of campaigns (in the left panel, use the by brand and by interaction status filters, and under the local navigation bar, use the time-range filters) to locate the campaign, and then double-click on the campaign.

The Campaign detail page opens and displays the Dashboard pane, which shows the campaign’s details.

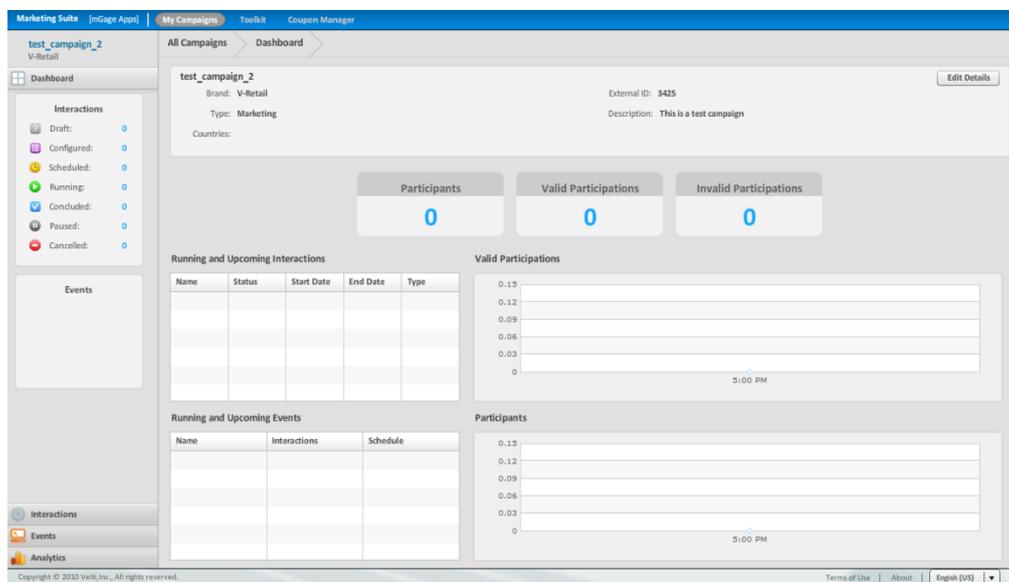


Figure 16 - Campaign (Detail) Interface

The Campaign detail page includes the following sections:

- **mGage™ MS navigation bar**—Displays the current location, **My Campaigns** is highlighted.
- **Local navigation bar**—Displays **All Campaigns > Dashboard**. Use this navigation bar to understand where you are within the My Campaigns process. When you open a

different pane in the Campaign detail page, Dashboard is replaced by the pane name (Interactions, Events, or Analytics). Click on **All Campaigns**, on the local navigation bar, to return to the All Campaigns dashboard at any time.

- **Left navigation and action panel**—Displays four campaign panes:
 - **Dashboard**—Shows campaign general information, Running and Upcoming Interactions, Running and Upcoming Events, and a Participants, Valid Participations, and Invalid Participations scoreboard.
 - **Interactions**—Shows a list of interactions for this campaign and includes action buttons to add, edit, filter, and delete interactions.
 - **Events**—Shows a list of events for this campaign and includes action buttons to add, edit, filter, and delete events.
 - **Analytics**—Shows campaign statistics in a graphical format, for each interaction, by coupon, engagement, message count, and performance.
- **Workspace/dashboard section**—Displays the campaign Dashboard pane, which is the default pane to open. In the left panel, click on any of the other panes (Interactions, Events, or Analytics) to display the related campaign information in the dashboard section.

4.4 Using the Campaign (Detail) Interface

You can perform the following tasks from the Campaign detail page:

On the Dashboard pane:

- “Viewing a Campaign,” on page 30.
- “Editing a Campaign’s General Information,” on page 31.

On the Interaction pane:

- “Adding an Interaction to a Campaign,” on page 35.
- “Configuring an Interaction in a Campaign,” on page 38.
- “Viewing an Interaction,” on page 41.
- “Editing an Interaction,” on page 42.
- “Pausing an Interaction,” on page 42.
- “Reactivating an Interaction,” on page 43.
- “Cancelling an Interaction,” on page 43.
- “Deleting an Interaction,” on page 44.
- “Filtering Interactions on the Campaign (Detail) Interaction Pane,” on page 44.

On the Events pane:

- “Adding Campaign Events,” on page 50.
- “Viewing an Event,” on page 65.
- “Editing an Event,” on page 66.

- “Pausing an Event,” on page 66.
- “Executing a Manual Event,” on page 67.
- “Resuming a Paused Event,” on page 67
- “Canceling an Event,” on page 67.
- “Deleting an Event,” on page 68.
- “Filtering Events on the Campaign (Detail) Events Pane,” on page 69.

On the Analytics pane:

- “Viewing a Campaign’s Coupon Analytics,” on page 74.
- “Viewing a Campaign’s Engagement (Participation) Analytics,” on page 75.
- “Viewing a Campaign’s Messages Analytics,” on page 76.
- “Viewing a Campaign’s Performance Analytics,” on page 77.

4.5 Campaign (Detail) Dashboard Pane

This section describes the Campaign detail Dashboard pane. Use the Campaign detail Dashboard to view campaign overview information for a specific campaign. You can access all the other Campaign detail panes (Interactions, Events, and Analytics) from the left panel. See “Using the Campaign (Detail) Dashboard Pane,” on page 30, for the various tasks you can perform using the Campaign detail Dashboard interface.

To access a campaign’s dashboard pane:

1. From the mGage™ MS Navigation bar, click **My Campaigns**.

The My Campaigns page appears and displays the All Campaigns list.

2. Filter the All Campaigns list of campaigns (in the left panel, use the by brand and by interaction status filters, and under the local navigation bar, use the time-range filters) to locate the campaign, and then double-click on the campaign.

The Campaign detail page opens and displays the Dashboard pane, which shows the campaign’s details.

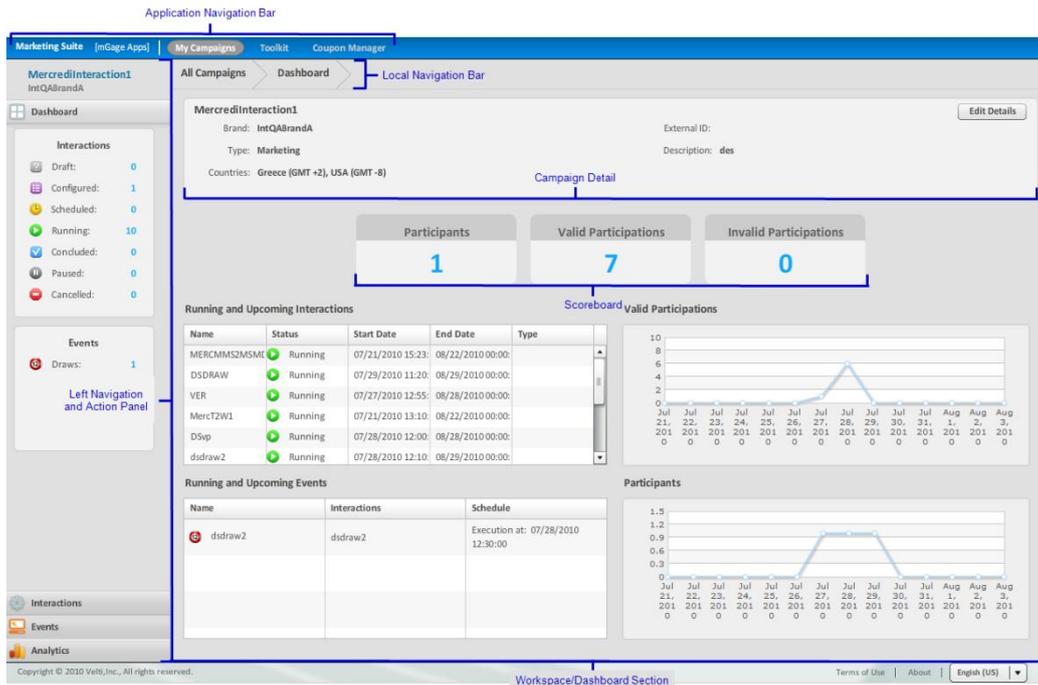


Figure 17 -Campaign (Detail) Dashboard Interface

The Campaign detail page’s Dashboard pane includes the following sections:

- **Local navigation bar**—Displays **All Campaigns > Dashboard**. Use this navigation bar to understand where you are within the My Campaigns process. When you open a different pane in the Campaign detail page, Dashboard is replaced by the pane name (Interactions, Events, or Analytics). Click on **All Campaigns**, on the local navigation bar, to return to the All Campaigns dashboard at any time.
- **Left navigation and action panel**—Includes two informational sections, Interactions and Events. The Interactions section displays the number of interactions there are for this campaign, by interaction status. The Interaction options are Draft, Configured, Scheduled, Running, Concluded, Paused, and Cancelled. The Events section displays the number of events there are for this campaign, by event type. The Events options are Draws and Instant Wins.

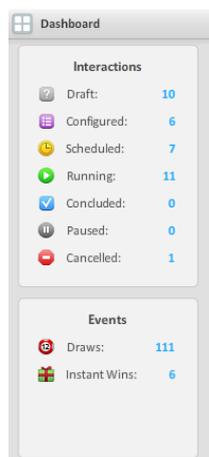


Figure 18 - Left Navigation and Action Panel (Campaign Dashboard)

- **Workspace/dashboard section**—The campaign dashboard section has four sections; campaign details, participations scoreboard, Running and Upcoming Interactions, and Running and Upcoming Events.
 - **Campaign detail**—Displays the campaign’s general information, for example, name, brand, and description. In addition, use the **Edit Details** button to edit the campaign’s general information.
 - **Participants/participations scoreboard**—Displays the total number of participants, valid participations, and invalid participations for the campaign (includes all interactions) to date, and shows cumulative data over time. The Participants number is the total number of unique participants to date for all interactions. The Valid Participations number is the total number of valid participations to date for all interactions. The Invalid Participations number is the total number of invalid participations to date for all interactions. (An invalid participation might be due to an individual sending the wrong coupon code.)
 - **Running and Upcoming Interactions**—Displays a list of all the interactions (currently running or scheduled to run) for this campaign.
 - **Running and Upcoming Events**—Displays a list of all the events (currently running or scheduled to run) for this campaign.
 - **Valid Participations Graph**—Displays the total number of valid participations for the campaign (includes all interactions) to date, and shows cumulative data over time.
 - **Participants Graph**—Displays the total number of participants for the campaign (includes all interactions) to date in a graphic format, and shows cumulative data over time.

Note: Data is typically no older than 30 seconds.

4.6 Using the Campaign (Detail) Dashboard Pane

You can perform the following tasks from the Campaign detail Dashboard pane:

- “Viewing a Campaign,” on page 30.
- “Editing a Campaign’s General Information,” on page 31.

4.6.1 Viewing a Campaign

You can view a campaign and track the progress of its various interactions and events using the Campaign detail page.

See “Campaign (Detail) Interface,” on page 26 for an overview of the Campaign detail page and its various panes.

To view a campaign:

1. On the mGage™ MS navigation bar, click **My Campaigns**.

The My Campaigns page appears and displays the All Campaigns list.

2. Do one of the following:

- Double-click on the campaign to view.
- Select the campaign to view, click the properties icon (), and then click **Open Campaign Dashboard**.

The Campaign detail page opens with the Campaign Dashboard pane open. It displays the campaign details, running and upcoming interactions, and running and upcoming events. You can click on any of the other panes (Interactions, Events, or Analytics) to view more campaign information.

4.6.2 Editing a Campaign's General Information

You can edit a campaign's general information and its interaction and events using the Campaign detail page. The campaign general information can be changed at any time; however, whether you can change an interaction or event depends on its current status. For more information, see “Editing an Interaction,” on page 42 and “Editing an Event,” on page 66.

To edit a campaign's general information:

1. On the mGage™ MS navigation bar, click **My Campaigns**.

The My Campaigns page appears and displays the All Campaigns list.

2. Do one of the following:

- Double-click on the campaign to view.
- Select the campaign to view, click the properties icon (), and then click **Open Campaign Dashboard**.

The Campaign detail page appears with the Dashboard pane open.

3. At the top of the page in the campaign details section, click **Edit Details**.

The campaign details section fields become editable.

4. You can edit the campaign Name, External ID, or the Description. If the campaign does not have an interaction associated with it yet, then you can also change the Brand.

5. Click **Save**.

4.7 Campaign (Detail) Interactions Pane

This section describes the Campaign detail Interactions pane. Use the Campaign detail Interactions pane to view, add, edit, and delete a campaign's interactions.

You can access all the other Campaign detail panes (Interactions, Events, and Analytics) from the left panel.

See “Using the Campaign (Detail) Interaction Pane,” on page 30, for the various tasks you can perform from the Campaign detail Interaction panel.

To access a campaign's interaction pane:

1. From the mGage™ MS Navigation bar, click **My Campaigns**.

The My Campaigns page appears and displays the All Campaigns list.

- Filter the All Campaigns list of campaigns (in the left panel, use the Brand and Interaction Statuses filters, and under the local navigation bar, use the time-range filters) to locate the campaign, and then double-click on the campaign.

The Campaign detail page opens and displays the Dashboard pane, which shows the campaign's details.

- In the left panel, click **Interactions**.

The Campaign detail page refreshes and displays the Interactions pane, which shows the campaign's interactions.

The screenshot displays the 'Interactions' pane for a campaign. The table below represents the data shown in the interface:

Name	Status	Start Date	End Date	Toolkit
Mercr2W1	Running	07/21/2010 13:10:00	08/22/2010 00:00:00	Text 2 Win
MERCMMMSZMSMDEBUG	Running	07/21/2010 15:23:00	08/22/2010 00:00:00	Text 2 Win
DS-PARTICIPANT!!!	Running	07/26/2010 17:50:00	08/27/2010 00:00:00	Text 2 Win
DSpertVOTE	Running	07/27/2010 10:10:00	08/28/2010 00:00:00	Vote And Poll
Dsv111	Running	07/27/2010 12:25:00	08/28/2010 00:00:00	Vote And Poll
DsvoteDS	Configured	-	-	Vote And Poll
Dsvote!!!	Running	07/27/2010 12:57:00	08/28/2010 00:00:00	Vote And Poll
VER	Running	07/27/2010 12:55:00	08/28/2010 00:00:00	Vote And Poll
Dsvp	Running	07/28/2010 12:00:00	08/28/2010 00:00:00	Vote And Poll
dsdraw2	Running	07/28/2010 12:10:00	08/29/2010 00:00:00	Text 2 Win
DSDRAW	Running	07/29/2010 11:20:00	08/29/2010 00:00:00	Text 2 Win

Figure 19 - Campaign (Detail) Interactions Interface

The Campaign detail page's Interaction pane includes the following sections:

- Local navigation bar**—Displays **All Campaigns > Interactions**. You can click **All Campaigns** to go back to the My Campaigns page. Use this navigation bar to understand where you are within the My Campaigns process. When you open a different pane in the Campaign detail page, Interactions is replaced by the pane name (Dashboard, Events, or Analytics). Click on **All Campaigns**, on the local navigation bar, to return to the All Campaigns dashboard at any time.
- Left navigation and action panel**—Includes a number of interaction template add buttons, one for each type of interaction (for example, Text 2 Win, Vote And Poll, On Pack, and Send Coupon). To add an interaction, click on one of the interaction template type buttons. The Select Interaction Template page appears and lists the available interaction templates; from this page you choose which interaction template to use. You use these interaction templates to map out the interactions between your campaign and the individuals targeted by your campaign. Which interaction templates you see depend on which brands your user account has access to.

Note: The interaction templates that appear in the Select Interaction Template page are not default templates. These templates were created using the mGage™ MS Toolkit feature. If you do not see an interaction template that suits your campaign, contact the person in your organization who is responsible for creating the interaction templates.



Figure 20 - Left Navigation and Action Panel (Campaign Interaction)

- **Workspace/dashboard section**—The campaign interaction dashboard section includes a list of all existing interactions associated with the campaign. To filter the list of interactions, use the date-range filter options located below the local navigation bar. To sort the interactions, click on the column headings. To open the interaction's dashboard, double-click on the interaction.

 A screenshot of a software interface showing a table of interactions. The table has columns for Name, Status, Start Date, End Date, and Toolkit. The rows contain data for three interactions: "inter 1-11", "test1", and "teeest int".

Name	Status	Start Date	End Date	Toolkit
inter 1-11	Configured	-	-	VoteAndPollToolkit
test1	Scheduled	14/06/2010	14/07/2010	Text2WinToolkit
teeest int	Configured	-	-	VoteAndPollToolkit

Figure 21 - Interaction (Dashboard)

- **Interactions properties panel**—The properties panel displays on the right side of the interface. By default this panel remains closed until you choose to open it. To view the interaction's overview details, select an interaction and then click the properties icon (ⓘ). Once the properties panel is open, click on another interaction in the interaction list to display its properties in the properties panel. To close the properties panel, click the properties icon again. The interaction properties panel includes the following sections:
 - **Action buttons**—Includes the Open Interaction Dashboard, Pause, Reactivate, Cancel, and Delete interaction buttons. Which action buttons display depends on the status of the interaction. To open the interaction's

Dashboard page and view all the interaction's information, click **Open Interaction Dashboard**.

- **Interaction Details**—Displays the interaction status, time period (the interaction start and end run dates), interaction type, the toolkit used to create the interaction, the channel the interaction is configured to use, and the countries the interaction will run in.
- **Linked Events**—Displays a list of events associated with this interaction. The event name and its status are shown. Click on a column heading to sort the events list.

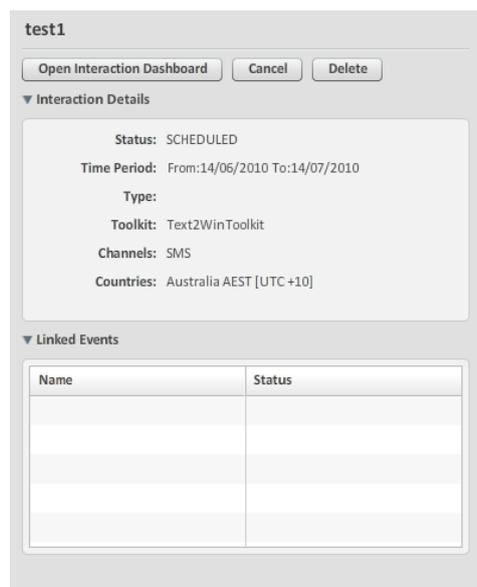


Figure 22 - Interaction Properties Panel

4.8 Using the Campaign (Detail) Interaction Pane

You can perform the following tasks from the Campaign detail Interaction pane:

- “Adding an Interaction to a Campaign,” on page 35.
- “Configuring an Interaction in a Campaign,” on page 38.
- “Viewing an Interaction,” on page 41.
- “Editing an Interaction,” on page 42.
- “Pausing an Interaction,” on page 42.
- “Reactivating an Interaction,” on page 43.
- “Cancelling an Interaction,” on page 43.
- “Deleting an Interaction,” on page 44.
- “Filtering Interactions on the Campaign (Detail) Interaction Pane,” on page 44.

4.8.1 Adding an Interaction to a Campaign

When you add an interaction to a campaign you define a set of tactics that outlines how your campaign will engage with your campaign's target audience. In this section you add an interaction to a campaign and define the interaction's general and regional setup information. This information cannot be edited later. Once you add the interaction to the campaign, you need to configure the interaction.

To add an interaction to a campaign:

1. From the mGage™ MS Navigation bar, click **My Campaigns**.

The My Campaigns page appears and displays the All Campaigns list.

2. Filter the All Campaigns list of campaigns (in the left panel, use the by brand and by interaction status filters, and under the local navigation bar, use the time-range filters) to locate the campaign, and then double-click on the campaign.

The Campaign detail page opens and displays the Dashboard pane, which shows the campaign's details.

3. In the left panel, click **Interactions**.

The Campaign detail page refreshes and displays the Interactions pane, which shows the campaign's interactions. In the left panel, the Add Interaction section displays all the interaction template types that are available for you to use.

4. Click on the interaction template type you want to add. The possible interaction template options are:

- **Text 2 Win**—An individual texts a keyword to a short code to participate in an interaction. Each time the individual participates he/she can earn points. The more points an individual earns the better the chance he/she has to win prizes.
- **Vote And Poll**—A poll/quiz is published through various media and an individual texts their vote to a short code. The individual can choose from a pre-determined list of vote/quiz options. For every vote the participant can receive an entry towards a draw.
- **On Pack**—An individual texts a keyword (unique code) from an on pack promotion to a short code to participate.
- **Send Coupon**—An individual texts a keyword (not unique) to a short code to receive a message containing a unique code.

5. The Select Interaction Template page appears and lists the available templates for that interaction template type.

Note: The interaction templates that appear in the Select Interaction Template page are not default templates. These templates were created using the mGage™ MS Toolkit feature. If you do not see an interaction template that suits your campaign, contact the person in your organization who is responsible for creating the interaction templates.

6. Select an interaction template and click **Select Template**.

The Interaction Configuration page appears.

7. In the General Information section, enter the interaction's general information.

Note: You cannot edit this information later.

- a. In the **Name** field, enter a unique, descriptive name for the interaction.
- b. In the **Service Name** field, enter a unique service identifier for the interaction. (mGage™ uses this field to uniquely identify the interaction when a participant sends a HELP or STOP message.)
- c. In the **External ID** field, enter the interactions external identification name or number.

The External ID value is user-defined. You can use this field to enter a tracking ID that has meaning within your organization. Typically, you should enter a value that is unique for each interaction. For example, you might want to track interactions based on a purchase order (PO) number for billing purposes. The External ID appears in reports, and you can export a report and filter it based on your organization's tracking ID values.

- d. In the Channels section, select one or more channel checkboxes on which to run the interaction. (Which channels you can select depend on how your interaction template administrator designed the interaction template.)
8. In the Regional Setup section, enter the interaction's regional information (country, language, and short code). This information determines in which geographical locations the interaction will run.

Note: You cannot edit this information later.

- a. From the countries drop-down menu, select the country that you want the interaction to run in, and then click **Add Country**. You can add one or more countries. To delete a country, click the delete country icon (✕).

The country appears in the regional setup list. To the right, for each country, there appear drop-down menus to select the language and routing short code options.

- b. You can select one or more languages for each country you add or you can use the same language (or languages) for all the countries you add. Do one of the following:
 - To select a language for a country, from the country's **Please select language** drop-down menu, select a language.
 - To select a language for all countries, select the **Use same language for all countries** checkbox, and then from the **Please select language** drop-down menu, select a language. (You can select multiple languages; however, each country uses all the languages you select.)
- c. From the **Please select routing** drop-down menu, select a routing short code for each country. You must select at least one routing short code for each country.

Note: The short codes that appear are set up in the mGage™ Messaging Administration component. If you do not see a short code that suits your campaign, contact the person in your organization who is responsible for creating the short codes.

9. If you are adding an On Pack interaction, you need to configure an additional section, **Categories Setup**. In this section you select a set of coupons (a category of coupons) to use with the interaction.

From the **Templates Categories** drop-down menu, select a template category, and then select a coupon category from the list below to associate the template category with the coupon category. You must associate a coupon category with each available template category.

Templates Categories:	Default Name	Redemption Policy	Configured Name
Category 1	Category 1	UNIQUE	category_una_1
	Category 2	UNIQUE_PER_USER	N/A
	Category 3	NOT_UNIQUE	N/A

Figure 23 - Categories/Coupons Setup

The number of coupon categories available to you depends on how your interaction template administrator designed the interaction template. Which coupon categories appear in the categories list depend on the brand with which this interaction is associated.

Note: The coupon categories that appear are set up in the mGage™ MS Coupon Manager tab. If you do not see a coupon category that suits your campaign, contact the person in your organization who is responsible for creating the coupon categories.

To the right appears the coupon category list. The Default Name, Redemption Policy, and Configured Name are shown. The coupon category you selected appears in the related template category's Configure Name column. The coupon category's redemption policy is determined by the template category with which it is associated. The redemption policy types are:

- **Unique**—Each coupon in the coupon category can be redeemed only once.
 - **Unique per user**—Each coupon in the coupon category can be redeemed only once per participant.
 - **Not unique**—Each coupon in the coupon category can be redeemed multiple times by multiple participants.
10. If you are adding a Vote And Poll interaction (Quiz or Vote), you need to configure additional information; question and answer information. In this section you set up question and answer definitions.

Click **Configure Answers**.

- a. In the **Question** field, enter a question name. For example, "Trivia Question 1"
- b. In the **Sample** field, enter the actual question to ask. For example, "What color is an orange?"
- c. The setting for the **Participant must be blocked until sending a valid response** checkbox cannot be altered. (Your interaction template administrator

configured this setting in the interaction template.) If this checkbox is selected, then the participant must send a valid response before the participant can continue to the next step of the interaction. You define valid responses in the Answering Procedure section, later in this procedure.

- d. The setting for the **Open a session for this questionnaire** checkbox cannot be altered. (Your interaction template administrator configured this setting in the interaction template.) If this checkbox is selected, then the participant has only a set amount of time to respond to the interaction; this time is set in the Session Duration field. Once the set amount of time has lapsed, if the participant sends a response, then it is considered invalid.
- e. In the **Session Duration** field, select the number of minutes the session can be active. (Your interaction template administrator chooses whether to include this setting in the interaction template.) If this field is active, you can set the session duration, in minutes.
- f. In the **Answering Procedure** section, enter an answer for each language. If two countries use the same language, then you enter answers only once for that language. In the first row, enter an answer. (If the first row (answer 1) has a green checkmark, it means this interaction is a Quiz and you should enter the correct answer in this row.) In the second row, enter an alternative answer. If there are additional answer rows/fields, enter more possible answers. (Your interaction template administrator defined how many possible answers there are for the interaction.) Each answer you enter corresponds to a condition and action in the Interaction Storyboard, which you will configure next.

11. Click **Save Interaction Configuration** to save the interaction to the campaign.

The Interaction Dashboard page appears. The Info and Targeting section displays a green checkmark to show it is complete. The interaction's status is Draft.

To configure the remainder of the interaction, see "Configuring an Interaction in a Campaign," on page 38.

4.8.2 Configuring an Interaction in a Campaign

When you added an interaction to a campaign you entered the general and regional setup information. Now you need to configure the remainder of the interaction. If you just added the interaction and you are still on the Interactions page, start at step 4.

To configure an interaction in a campaign:

1. On the mGage™ MS navigation bar, click **My Campaigns**.

The My Campaigns page appears and displays the All Campaigns list.

2. Double-click on the campaign that includes the interaction you want to configure.

The Campaign detail page opens and displays the Dashboard pane, which shows the campaign's details.

3. In the left panel, click **Interactions**.

The Interactions page appears.

4. Double-click on the interaction you want to configure.

The Interaction Dashboard page appears. The Info and Targeting section displays a green checkmark to show it is complete. The interaction's status is Draft.

5. Configure the interaction's storyboard.

a. Click **Configure Storyboard**.

The Interaction Storyboard Configuration page appears.

b. You must enter storyboard information for each country in the left panel's Storyboard section.

Click on a country. The language you selected for that country appears in the language list and the storyboard dialogs refresh. You can set up storyboard dialogs for each country, but at this point the storyboards all have the same default text.

When you created the interaction, if you selected more than one language for the country, then each language has a separate storyboard (unless you selected Use same languages for all countries checkbox). You must set up storyboard dialogs for each language. For example, if you select Spain as the country, and then you select Spanish and Catalan for the languages, you will have two storyboards to configure.

c. (Optional.) To create a separate storyboard for each routing-language combination for this country, select the **Use custom messages for each routing** checkbox. The language list refreshes and displays each routing-language combination.

When you created the interaction, if you selected more than one routing, then on the Interaction Storyboard Configuration page, you can select the **Using custom messages for each routing** checkbox. This action creates a storyboard for each routing-language combination per country. For example, if you select Spain as the country, Spanish and Catalan for the languages, and you select two routing numbers, and then you select the Using custom messages for each routing checkbox, you will have four storyboards to configure.

d. Click on a language (and routing). The storyboard dialogs refresh.

e. Edit the default settings in the storyboard dialogs. The conditions and actions you see and need to configure depend on how your interaction template administrator set up the interaction template. Typically you might need to enter message content, enter award points, and/or select a coupon category. For an explanation of the storyboard conditions and actions, see “

f. Appendix A,” on page 118.

g. (Optional.) To add an additional (test, pause, or post) message, on the left panel, click the checkbox for the message you want to add. In the associated message field, enter an appropriate message.

If you select one of these messages, then you must enter message content for each storyboard. In other words, these additional messages are globally set on or off at the interaction level.

Note: If you do not set up the test or post messages, then you cannot set up test and post periods (during scheduling and activation). Also, if you do not set

up the pause message and you need to pause the interaction later, your interaction will not have a pause message associated with it.

- h. On the right, in the Preview Interactions section, you can see a preview of the storyboard. Below, in the Errors and Warnings section, you see a message if you are missing configuration information or if you have made an error with the configuration.
- i. When you have configured the storyboard, click **Save Interaction Storyboard**.

The Interaction Dashboard page appears. The Storyboard section displays a green checkmark to show it is complete. The interaction's status is Draft.

6. Activate each of the interaction's channels. The channels that are set up for this interaction each have an Activate button.
 - a. To activate an interaction channel, in the Schedule and Activation section, click on the channel's **Activate** button.

The Interaction Routing Configuration page appears.

- b. In the Activation section, using the **Active from** date widget, set the interaction's start date and time. (The interaction's start date and time is in UTC time.)
- c. (Optional.) Using the **Active to** date widget, set the interaction's end date and time. (The interaction's end date and time is in UTC time.)
- d. (Optional.) To set up a test period prior to running the interaction, click the **Test Period** checkbox and enter the number of days and hours for the test period. Use the test period to inform participants that the interaction has not started yet. The test period start date and time is calculated from the Active from field. (For example, if the Active from date and time is 08/23/2010, 10:00 and the test period is 1 hour, then the test period starts at 08/23/2010, 09:00 and ends at 08/23/2010, 10:00.)

Note: If the Test Period checkbox is inactive, you might not have created a test message on the storyboard. You can edit the storyboard and add a test message, and then select the Test Period checkbox.

- e. (Optional.) To set up a post period after running the interaction, click the **Post Period** checkbox and enter the number of days and hours for the post period. Use the post period to inform participants that the interaction has ended. The post period is calculated from the Active to field. (For example, if the Active to date and time is 08/31/2010, 18:00 and the post period is 1 hour, then the post period starts at 08/31/2010, 18:00 and ends at 08/31/2010, 19:00.) If you did not select an interaction end date and time, you cannot set up a post period.

Note: If the Post Period checkbox is inactive, you might not have created a post message on the storyboard. You can edit the storyboard and add a post message, and then select the Post Period checkbox.

- f. Click **Get Available Keywords**.
- g. In the Routing and Keywords section, you must select the keywords to use with the interaction's routing short codes. To select a keyword, click on a country's expand icon (►), then click the country's interaction. In the column to the

right, the short code's available keywords appear. Select a keyword checkbox to associate the keyword with the routing short code, and then from the language drop-down menu, select a language. If there are two or more languages per country, you need to select a different keyword with each language.

If you do not see any available keywords, you can create a new keyword or enter a different activation period. (Keywords are set up in the mGage™ Messaging Administration component. If you do not see a keyword that suits your campaign, contact the person in your organization who is responsible for creating the keyword. See the *mGage™ Messaging Administration User's Guide*.)

Note: If you change the Activate period, then you need to re-select the keywords.

- h. In the Additional Messages section, you must add help and stop messages for each of the countries' specified languages. To add a message, click on the country's expand icon (▶), then click on a language. In the Help Message and Stop Message fields enter the appropriate messages.
- i. Click **Submit**.

The Interaction Dashboard page appears. The Activation section displays a green checkmark to show it is complete. The interaction's status is Scheduled.

4.8.3 Viewing an Interaction

You can view an interaction from the My Campaigns tab by selecting the interaction's campaign, and then clicking on the interaction to open the Interaction Dashboard page.

To view an interaction in a campaign:

1. On the mGage™ MS navigation bar, click **My Campaigns**.
The My Campaigns page appears and displays the All Campaigns list.
2. Double-click on the campaign that includes the interaction you want to view.
The Campaign detail page opens and displays the Dashboard pane, which shows the campaign's details.
3. If the interaction's status is either Scheduled or Running, then in the Running and Upcoming Interactions section, double-click on the interaction to open the interaction dashboard page.
4. If the interaction's status is Draft or Configured, on the left panel, click **Interactions**.
The Interactions panel opens.
5. Double-click on the interaction to open the Interaction Dashboard page.

Alternatively, if you want to view high level interaction information before viewing the interaction's detailed information, select the interaction and click on the properties icon (i) to open the properties panel. From the properties panel, click **Open Interaction Dashboard** to open the Interaction Dashboard page.

4.8.4 Editing an Interaction

From the My Campaigns tab, you can edit an interaction that is in the Draft, Configured, Scheduled, or Paused state. If you want to edit a running interaction, you must first pause the interaction.

To edit an interaction in a campaign:

1. On the mGage™ MS navigation bar, click **My Campaigns**.

The My Campaigns page appears and displays the All Campaigns list.

2. Double-click on the campaign that includes the interaction you want to configure.

The Campaign detail page opens and displays the Dashboard pane, which shows the campaign's details.

3. Select the interaction, and then click on the properties icon () to open the properties panel.

Do one of the following depending on the interaction's status:

- If the interaction's status is Draft, Configured, Scheduled, or Paused, then click **Open Interaction Dashboard**.
- If the interaction's status is Running, then click **Pause**. Once the interaction is paused, you can click **Open Interaction Dashboard**.

The Interaction Dashboard page appears.

4. To change the interaction's storyboard options, click **Storyboard**, make your changes, and then click **Save Interaction Storyboard**. (For more information about the interaction's storyboard options, see step 5 of "Configuring an Interaction in a Campaign," on page 38.)
5. To change the interaction's schedule or keywords, click on the Channel's **Activate** button, make your changes, and then click **Save Interaction Routing**. (For more information about the interaction's scheduling and keyword options, see step 6 of "Configuring an Interaction in a Campaign," on page 38.)

4.8.5 Pausing an Interaction

From the My Campaigns tab, you can pause an interaction that is in the Running state.

To pause an interaction in a campaign:

1. On the mGage™ MS navigation bar, click **My Campaigns**.

The My Campaigns page appears and displays the All Campaigns list.

2. Double-click on the campaign that includes the interaction you want to pause.

The Campaign detail page opens and displays the Dashboard pane, which shows the campaign's details.

3. In the left panel, click **Interactions**.

The Interactions panel opens.

4. Select the interaction, and then click on the properties icon () to open the properties panel.

5. The properties panel opens and displays the interaction's high level information.
6. On the properties panel, click **Pause**.

The properties panel closes, and the Interaction Dashboard refreshes to show that the interaction's status is Paused.

4.8.6 Reactivating an Interaction

From the My Campaigns tab, you can reactivate an interaction that is in the Paused state.

To reactivate an interaction in a campaign:

1. On the mGage™ MS navigation bar, click **My Campaigns**.

The My Campaigns page appears and displays the All Campaigns list.

2. Double-click on the campaign that includes the interaction you want to pause.

The Campaign detail page opens and displays the Dashboard pane, which shows the campaign's details.

3. In the left panel, click **Interactions**.

The Interactions panel opens.

4. Select the interaction, and then click on the properties icon () to open the properties panel.

5. The properties panel opens and displays the interaction's high level information.

6. On the properties panel, click **Reactivate**.

The properties panel closes, and the Interaction Dashboard refreshes to show that the interaction's status is Running.

4.8.7 Cancelling an Interaction

From the My Campaigns tab, you can cancel an interaction that is in the Scheduled, Paused, or Running state.

To cancel an interaction in a campaign:

1. On the mGage™ MS navigation bar, click **My Campaigns**.

The My Campaigns page appears and displays the All Campaigns list.

2. Double-click on the campaign that includes the interaction you want to cancel.

The Campaign detail page opens and displays the Dashboard pane, which shows the campaign's details.

3. In the left panel, click **Interactions**.

The Interactions panel opens.

4. Select the interaction, and then click on the properties icon () to open the properties panel.

5. On the properties panel, click **Cancel**.

The properties panel closes, and the Interaction Dashboard refreshes to show that the interaction's status is Cancelled.

4.8.8 Deleting an Interaction

From the My Campaigns tab, you can delete an interaction that is in the Draft, Configured, or Scheduled state.

To delete an interaction from a campaign:

1. On the mGage™ MS navigation bar, click **My Campaigns**.
The My Campaigns page appears and displays the All Campaigns list.
2. Double-click on the campaign that includes the interaction you want to delete.
The Campaign detail page opens and displays the Dashboard pane, which shows the campaign's details.
3. In the left panel, click **Interactions**.
The Interactions panel opens.
4. Select the interaction, and then click on the properties icon () to open the properties panel.
5. On the properties panel, click **Delete**.
A confirmation window opens to confirm you want to delete the interaction.
6. Click **Confirm**.
The properties panel closes, and the Interaction Detail page's Interaction panel refreshes to show that the deleted interaction has been removed.

4.8.9 Filtering Interactions on the Campaign (Detail) Interaction Pane

You can filter which interactions appear in the Campaigns detail Interaction pane. For example, you can view all existing interactions or you can filter interaction by time range, interaction status, and interaction template type.

To filter all interactions by time range:

1. From the mGage™ MS Navigation bar, click **My Campaigns**.
The My Campaigns page appears and displays the All Campaigns list.
2. Filter the All Campaigns list of campaigns (in the left panel, use the by brand and by interaction status filters, and under the local navigation bar, use the time-range filters) to locate the campaign, and then double-click on the campaign.
The Campaign detail page opens and displays the Dashboard pane, which shows the campaign's details.
3. In the left panel, click **Interactions**.
The Campaign detail page refreshes and displays the Interactions pane, which shows the campaign's interactions.
4. Select a time-driven filter option; All, Today, This Week, This Month, 24 Hours, 7 Days, 30 Days, or Custom. Use these time-driven filtering options to display only interactions that are scheduled to *start* running during the specified time range.

- **All**—To view all interactions, click the **All** time range filter option. (This is the only time range that you can see interactions in the Draft and Configured state.)
- **Today**—To view interactions that are scheduled to start running today, click the **Today** time range filter option. (Today is defined as one second past midnight to midnight. For example, from 07:30:2010 00:00:01 to 07:30:2010 24:00:00.)
- **This Week**—To view interactions that are scheduled to start running this week, click the **This Week** time range filter option. (This Week is defined as one second past midnight (Sunday morning) to midnight Saturday. For example, from 07:25:2010 00:00:01 to 07:31:00 24:00:00.)
- **This Month**—To view interactions that are scheduled to start running this month, click the **This Month** time range filter option. (This month is defined as one second past midnight (morning of the first day of the month) to midnight on the last day of the month. For example, from 07:01:2010 00:00:01 to 07:31:2010 24:00:00.)
- **24h**—To view interactions that were scheduled to start running in the past 24 hours, click the **24h** time range filter option. (24h is defined as the previous 24 hours from the current time. For example, if the current time is 07:25:2010 08:00:01, then selecting 24h displays the interactions that started running between 07:24:2010 08:00:00 and 07:25:2010 08:00:01.)
- **7d**—To view interactions that were scheduled to start running in the past 7 Days, click the **7d** time range filter option. (7d is defined as the previous 7 days from the current date and time. For example, if the current date and time is 07:26:2010 08:00:01, then selecting 7d displays the interactions that started running between 07:20:2010 08:00:00 and 07:26:2010 08:00:01.)
- **30d**—To view interactions that were scheduled to start running in the past 30 days, click the **30d** time range filter option. (30d is defined as the previous 30 days from the current date and time. For example, if the current date and time is 07:31:2010 08:00:01, then selecting 30d displays the interactions that started running between 07:01:2010 08:00:00 and 07:31:2010 08:00:01.)
- **Custom**—To view interactions based on your own custom date and time range, click the **Custom** time range option, and then enter a date and time range.

The interactions list refreshes and displays all interactions that start within the specified date and time range.

5. To the right of the time-driven filtering options are additional filtering options; previous (left arrow icon, ) and next (right arrow icon, ). Click on these icons to display interactions that match a specific time range's previous or next time range.

For example, click **30d** to display all interactions that match the past 30 days time range. The interactions for the past 30 days time range displays, for example, from 07:01:2010 08:00:00 to 07:31:2010 08:00:01. Next, click the previous arrow icon (left arrow icon, ) to display all interactions that match the previous 30 days to the past 30 days, for example, from 06:01:2010 08:00:00 to 07:01:2010 08:00:01.

6. You can sort the interactions list by any of the interaction list's column headings, for example, interaction start or end date.

To filter interactions by interaction template type:

1. From the mGage™ MS Navigation bar, click **My Campaigns**.

The My Campaigns page appears and displays the All Campaigns list.

2. Filter the All Campaigns list of campaigns (in the left panel, use the by brand and by interaction status filters, and under the local navigation bar, use the time-range filters) to locate the campaign, and then double-click on the campaign.

The Campaign detail page opens and displays the Dashboard pane, which shows the campaign's details.

3. In the left panel, click **Interactions**.

The Campaign detail page refreshes and displays the Interactions pane, which shows the campaign's interactions.

4. To filter the interactions list by interaction template type, click on the Toolkit column's heading.

The interactions list resorts and lists the interactions in alphanumeric order by the toolkit name.

Similarly, you can sort the interactions list by any of the other interaction list's column headings, for example, interaction start or end date.

To filter interactions by interaction status:

1. From the mGage™ MS Navigation bar, click **My Campaigns**.

The My Campaigns page appears and displays the All Campaigns list.

2. Filter the All Campaigns list of campaigns (in the left panel, use the by brand and by interaction status filters, and under the local navigation bar, use the time-range filters) to locate the campaign, and then double-click on the campaign.

The Campaign detail page opens and displays the Dashboard pane, which shows the campaign's details.

3. In the left panel, click **Interactions**.

The Campaign detail page refreshes and displays the Interactions pane, which shows the campaign's interactions.

4. To filter the interactions list by interaction status type, click on the Status column's heading.

The interactions list resorts and lists the interactions in alphanumeric order by the status name.

Similarly, you can sort the interactions list by any of the other interaction list's column headings, for example, interaction start or end date.

4.9 Campaign (Detail) Events Pane

This section describes the Campaign detail Events pane. Use the Campaign detail Events pane to view, add, edit, and delete a campaign's events.

You can access all the other Campaign detail panes (Dashboard, Interactions, and Analytics) from the left panel.

See “Using the Campaign (Detail) Events Pane,” on page 50, for the various tasks you can perform from the Campaign detail Events pane.

To access a campaign’s events pane:

1. From the mGage™ MS Navigation bar, click **My Campaigns**.

The My Campaigns page appears and displays the All Campaigns list.

2. Filter the All Campaigns list of campaigns (in the left panel, use the by brand and by interaction status filters, and under the local navigation bar, use the time-range filters) to locate the campaign, and then double-click on the campaign.

The Campaign detail page opens and displays the Dashboard pane, which shows the campaign’s details.

3. In the left panel, click **Events**.

The Campaign detail page refreshes and displays the Events pane, which shows the campaign’s events.

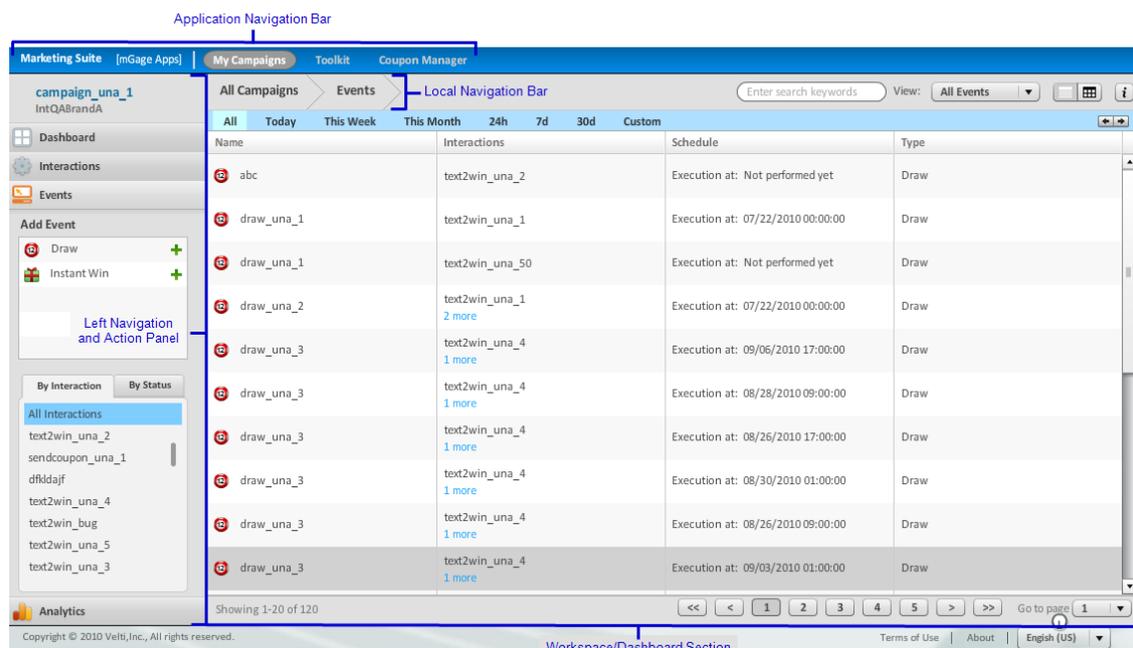


Figure 24 - Campaign (Detail) Events Interface

The Campaign detail page’s Events pane includes the following sections:

- **Local navigation bar**—Displays **All Campaigns > Events**. You can click **All Campaigns** to go back to the My Campaigns page. Use the View drop-down menu to filter the events list to display events of the selected event type.
- **Left navigation and action panel**—Includes a number of event add buttons, one for each type of event (for example, Draw and Instant Win). To add an event, click on one of the event type buttons; the event form page appears. You use these event forms to define specific, short-term, engagement goals. The event’s associated interactions generate a pool of possible event participants.

The left panel also includes two filters; By Interaction and By Status. Use these filters to manipulate which events display in the events list. Use By Interaction to list all events associated with the selected interaction. Use By Status to list all events that are associated with interactions that are of the selected status. (These filters can be used in conjunction with the View (event type) drop-down menu.)

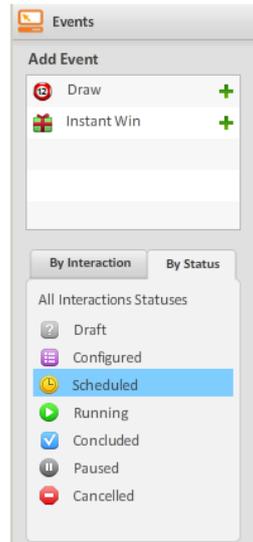


Figure 25 - Left Navigation and Action Panel (Campaign Events)

- Workspace/dashboard section**—The campaign event dashboard section includes a list of all existing event instances associated with the campaign. (Although you set up one event, you might have two or more instances of that event. The list of events is actually a list of all the instances of each event.) To filter the list of events, use the date-range filter options located below the local navigation bar (in conjunction with the By Interaction or By Status (interaction status), and View (event type) drop-down menu filtering options). To sort the event instances, click on the column headings. To view, edit, or delete an event, double-click on the event or select the event and click on the event properties panel icon ().

All Campaigns		Events		Enter search keywords		View: Instant Wins	
All	Today	This Week	This Month	24h	7d	30d	Custom
Name	Interactions			Schedule		Status	
instantwin_1_una3	coupon_1_una 1 more			Recurrent From 22/06/2010 to 24/06/2010		Scheduled	
Showing 1-1 of 1							

Figure 26 - Interaction (Dashboard)

- Events properties panel**—The properties panel displays on the right side of the interface. By default this panel remains closed until you choose to open it. To view an event instance’s overview details, double-click the event instance or select an event instance and then click the properties icon (i). Once the properties panel is open, click on another event instance in the event list to display its properties in the properties panel. To close the properties panel, click the properties icon again. The event properties panel includes the following sections:
 - Action buttons**—Includes different action buttons depending on the type of event. For example, a Draw event has the Edit, Cancel, and Execute action buttons, while an Instant Win event has the Edit, Pause, Cancel, Resume, and Delete action buttons. You can choose to perform an action on only that instance of the event or on all instances of the event.
 - Event Details**—Displays the event instance’s general information, for example, the interactions that the event is associated with, the associated interactions’ status, and the event’s execution date and time. Also displayed are the prize and winner information and the event eligibility information. At the bottom of the properties panel, the event notifications appear. You can edit event notifications from the properties panel.

Draw

Edit Cancel

▼ General Information

Name: draw_una_42
Interaction: text2win_una_42
Status: Scheduled
Execution Date: 08/19/2010 00:00:00
Type: Automatic

▼ Prize And Winners

Winners: 1
Runners-Up: 0
Prize: iPod

▼ Eligibility

From: 08/18/2010 21:00:00
To: 08/18/2010 22:00:00
Participation: All entries
Participants: 0

▼ Notifications

SMS

english

Draw winners will be notified with the following SMS message.

Not set.

Figure 27 - Event Properties Panel

4.10 Using the Campaign (Detail) Events Pane

You can perform the following tasks from the Campaign detail Events pane:

- “Adding Campaign Events,” on page.
- “Adding a Draw Event to a Campaign,” on page 51.
- “Adding an Instant Win Event to a Campaign,” on page 60.
- “Viewing an Event,” on page 65.
- “Editing an Event,” on page 66.
- “Pausing an Event,” on page 66.
- “Executing a Manual Event,” on page 67.
- “Resuming a Paused Event,” on page 67.
- “Canceling an Event,” on page 67.
- “Deleting an Event,” on page 68.
- “Filtering Events on the Campaign (Detail) Events Pane,” on page 69.

4.10.1 Adding Campaign Events

While an interaction defines a set of tactics to engage your campaign’s target audience, an event (dependent on at least one interaction) provides additional

engagement opportunities and activities (for example, a draw or instant win). An event can have a one-time instance or repeatable instances, and it has a specific, short-term, engagement goal, for example, to execute a draw for a prize. The event's associated interactions provide a pool of possible event participants. The event has a start date and time and an end date and time, which is restricted within the associated interaction's start date and time and end date and time. When an event has multiple instances they all occur within this time range. Each event instance has a start date and time, or eligibility period. Only interaction participants that are active during the event instance's eligibility period qualify to participate in that event instance. The actual execution date (for example, the draw) can be either at the end of the event instance's eligibility period or at a user-defined date and time after the eligibility period ends. You can define the event's instance duration (eligibility period), reoccurrence frequency, execution date and time, number of winners, and participation type (for example, all entries or all points).

You can add different types of events to a campaign. mGage™ MS currently provides the following types of events:

- **Draw**—The Draw event's configuration determines which of the associated interactions' participants are eligible for the event. Each event instance participant receives one or more entries for a draw with a prize. The number of entries gives weight to the chance of winning the draw. When the draw executes, mGage™ MS randomly picks one or more winners from the eligible participants and notifies the winners via SMS or email. If you set up a draw that occurs once a week for 5 weeks, and specify one winner per instance, then over the course of the event there will be a total of five winners, one for each event instance.

To add a Draw event, see “Adding a Draw Event to a Campaign,” on page 51.

- **Instant Win**—The Instant Win event's configuration determines which of the associated interactions' participants are eligible for the event. The participant who participates first, after the time the Winning Point is set, is the winner. An instant win is a time-based award mechanism (and not based on a pool of entries).

To add an Instant Win event, see “Adding an Instant Win Event to a Campaign,” on page 61.

4.10.2 Adding a Draw Event to a Campaign

You can add a draw event with one or more instances to your campaign. You can define the event's instance duration (eligibility period), reoccurrence frequency, execution date and time, number of winners, and participation type (for example, all entries or all points).

To add a draw event to a campaign:

1. On the mGage™ MS navigation bar, click **My Campaigns**.

The My Campaigns page appears and displays the All Campaigns list.

2. Double-click on the campaign to which you want to add an event.

The Campaign detail page opens and displays the Dashboard pane, which shows the campaign's details.

3. In the left panel, click **Events**.

The Events panel opens. The Add Event section displays all the event types that are available for you to add.

4. Click the Draw event's add button ().

The Draw Form page opens and displays three tabs; General, Schedule, and Notifications. By default, the General tab is active.

5. Click the General tab to enter draw event information into the General section.

- a. In the **Name** field, enter a unique event name.
- b. In the Interaction section, select an interaction from the Available column, and then click the select right arrow () button to move it into the Selected column. (You can remove an interaction from the Selected column using the select left arrow () button.) The Available column only shows interactions that are either in the Configured or Running state.

You can select one or more interactions. The combined start and end dates and times of the interactions restrict the date and time range you can set for the event. In other words, the event must start and end within the combined interaction's date and time range.

- c. From the **Execution** drop-down menu, select the execution type; automatic or manual. mGage™ MS executes the automatic execution type on the execution date and time by randomly selecting a winner; whereas, you manually execute the manual execution type, from the event's properties panel, anytime after the event's eligibility period.
 - d. In the **Prize** field, enter the prize description, for example, an iPod. If the event has multiple instances, then this is the prize for each event instance.
 - e. In the **Winners** field, enter the number of winners for this event. If the event has multiple instances, then this is the number of winners for each event instance. (For example, if an event has two instances and you enter 2 in the Winners field, then in total there will be four winners.)
 - f. (An optional Draw event field.) In the **Runners Up** field, enter the number of runner up winners for this event. If a winner refuses a prize, then the first runner up becomes the winner. If the event has multiple instances, then this is the number of runner up winners for each event instance. (For example, if an event has two instances and you enter 5 in the Runners Up field, then in total there will be 10 runner-up winners.)
6. Click the **Schedule** tab to enter draw event information into the Schedule section. Part of setting up the schedule is to select an event frequency. Depending on which frequency interval you choose, the event time range, recurrence range, and execution pattern information might differ. mGage™ MS currently provides the following event frequencies:
 - **Once**—To set up an event to occur once, see “Setting Up a Draw Event with Once Frequency,” on page 53.
 - **Hourly**—To set up an event with a 1 hour duration (eligibility period) and that occurs based on an hour-pattern, see “Setting Up a Draw Event with an Hourly Frequency,” on page 55.

- **Daily**—To set up an event with a 1 day duration (eligibility period) and that occurs based on a day-pattern, see “Setting Up a Draw Event with a Daily Frequency,” on page 57.
 - **Weekly**—To set up an event with a 1 week duration (eligibility period) and that occurs based on a week-pattern, see “Setting Up a Draw Event with a Weekly Frequency,” on page 59.
7. Click the **Notifications** tab to enter draw event information into the Notifications section. You can send a SMS and/or an email notification.
 - To send an SMS notification to event winners, select the **Send the following SMS notification...** checkbox.
 - a. From the **Locales** drop-down menu, select a language. The available language options depend on the interactions for this event. Enter notification content for each locale.
 - b. From the **Insert Smart Field** drop-down menu, select a smart field or in the text field, enter the message to send to the event winners. Enter notification content for each locale.
 - To send an email notification to internal staff to let them know that the event has executed, select the **Send an email...** checkbox.
 - a. In the text field, enter a list of email addresses, separated by commas.

mGage™ MS generates an automatic email with information about the event instance and winners.
 8. Click **Apply**, to save the event.

4.10.3 Setting Up a Draw Event with Once Frequency

This section explains how to set up the Schedule tab for a Draw Event with a once frequency. You must first follow the steps in “Adding a Draw Event to a Campaign,” on page 51, and then follow the steps in this section.

To set up a draw event with once frequency:

1. From the **Frequency** drop-down menu, select the **Once** frequency interval for this event. (In other words, this event occurs once at the end of the event’s time range or eligibility period.)
2. Enter the event’s start/end time range:
 - a. In the **Starts** field, use the date widget to enter a start date and time for this event. (Date and time are set to UTC.)

Under the Starts date and time fields the UI states that the Start date must be after a specific date and time. This date is determined by the earliest start date and time for the associated interactions.
 - b. In the **Ends** field, use the date widget to enter an end date and time for this event. (Date and time are set to UTC.)

Under the Ends date and time fields the UI states that the end date must be before a specific date and time. This date is determined by the latest end date and time for the associated interactions.

3. Select the event's execution date option (when the draw executes):
 - To execute the draw at the end of the event's eligibility period, select the **Upon the end of eligibility period radio button**. In other words, execute the draw when the event ends.
 - To execute the draw at a specific date and time, select the **On** radio button, and use the date widget to enter the draw execution date and time. The execution date and time can be anytime after the event ends. (Date and time are set to UTC.)

Note: When selecting the execution date and time, you should consider the fact that a SMS notification will be sent automatically to the winner, if you set up a notification on the Notifications tab.
4. From the **Participation** drop-down menu, select a participation mode. Which participation modes you can choose depend on the associated interaction's storyboards.
 - **All Entries**—Entries accumulate and roll-over. Each time an individual participates in an interaction they are granted an entry. Only entries that occur during an event instance are eligible for an event instance draw. If you select **All Entries**, then each time there is an event instance and a participant interacts with the event's interaction, all the participant's entries from the event's previous instances roll-over and become eligible for the current event instance's draw. So long as the participant keeps interacting with the event's interaction (during an event instance) the participant's entries keep accumulating and are eligible for the next draw. The greater the number of entries a participant has the greater the chance a participant has of winning the draw.
 - **All Points**—Points accumulate and roll-over. Each time an individual participates in an interaction they are granted an entry (and potentially awarded points). Only points that are awarded during an event instance are eligible for an event instance draw. If you select **All Points**, then each time there is an event instance and a participant interacts with the event's interaction, all the participant's points from the event's previous instances roll-over and become eligible for the current event instance's draw. So long as the participant keeps interacting with the event's interaction (during an event instance) the participant's points keep accumulating and are eligible for the next draw. The greater the number of points the participant has the greater the chance the participant has of winning the draw.
 - **Entries with each occurrence**—Entries per event instance. Each time an individual participates in an interaction they are granted an entry. Only entries that occur during an event instance are eligible for the event instance's draw. If you select **Entries with each occurrence**, then only entries that occur during a specific event instance are eligible for that event instance's draw. The greater the number of entries a participant has the greater the chance the participant has of winning the draw.
 - **Points with each occurrence**—Points per event instance. Each time an individual participates in an interaction they are granted an entry (and potentially awarded points). If you select **Points with each occurrence**, then

only the points awarded for a specific event instance are eligible for the draw. The greater the number of points the participant has the greater the chance the participant has of winning the draw.

5. Return to the “Adding a Draw Event to a Campaign,” section on page 51 and complete the Notification tab.

4.10.4 Setting Up a Draw Event with an Hourly Frequency

This section explains how to set up the Schedule tab for a Draw event with an hourly frequency. You must first follow the steps in “Adding a Draw Event to a Campaign,” on page 51, and then follow the steps in this section.

To set up a draw event with an hourly frequency:

1. From the **Frequency** drop-down menu, select the **Hourly** frequency interval for this event.

Each event instance will run (the eligibility period) for 1 hour. If multiple event instances exist, then they reoccur based on an hour-pattern within the event’s start and end date and time range. The first event instance’s start date and time and the event’s reoccurrence pattern are set by the Execution Pattern field.

2. In the **Starts** field, enter a start date and time for this event. (Date and time are set to UTC.)

Under the Starts date and time fields the UI states that the Start date must be after a specific date and time. This date is determined by the earliest start date and time for the associated interactions.

3. Select an event execution pattern option. This option determines when the first event instance (eligibility period) and any following event instances occur:

- To execute the event based on the number of hours elapsed, select the **Every** radio button and in the **hours** field enter a number to represent the time interval (in hours) to execute this event. For example, the first event instance starts at the event’s start date and time and ends 1 hour later (the first eligibility period), then if you entered 24 into the hours field, the next event instance occurs 24 hours later.
- To execute the event based on a specified day and time, select the **On the following days and hours** radio button, and then select the days and hours checkboxes to execute this event. For example, if you select the **Sun** checkbox and the **20** checkbox, then this event executes every Sunday at 20:00:00 UTC. The first event executes on the first occurrence of a Sunday at 20:00:00 UTC on or after the event start date and time and the last occurrence executes on the last occurrence of a Sunday at 20:00:00 UTC on or before the event’s end date and time.

4. Select an event recurrence range option:

- To end the event execution after a specified number of instances, select the **Ends after** radio button. In the **Recurrence** field enter a number to represent how many times this event should occur before the event ends. For example, if you enter 10 into the Recurrence field, then this event will not end until it occurs 10 times (10 instances).

- To end the event execution on a specified date and time, select the **End by** radio button and enter a date and time to determine when the event ends. For example, if you entered 04/30/10 16:00:00 UTC, then this event ends on April 30th, 2010 at 16:00:00 UTC no matter how many times the event occurred.

Under the Ends date and time fields the UI states that the end date must be before a specific date and time. This date is determined by the latest end date and time for the associated interactions.

5. Select an execution date option (when the draw occurs):

- Select the **Upon the end of eligibility period** radio button to execute the draw at the end of the eligibility period.
- Enter a number and, from the drop-down menu, select **minutes**, **hours**, or **days** to represent how many minutes, days, or hours should transpire from the end of the eligibility period before the draw executes.

Note: When selecting the execution date and time, you should consider the fact that a SMS notification will be sent automatically to the winner, if you set up a notification on the Notifications tab.

6. From the **Participation** drop-down menu, select a participation mode. Which participation modes you can choose depend on the associated interaction's storyboards.

- **All Entries**—Entries accumulate. Each time an individual participates in an interaction they are granted an entry. Only entries that occur during an event instance are eligible for an event instance draw. If you select **All Entries**, then each time there is an event instance and a participant interacts with the event's interaction, all the participant's entries from the event's previous instances roll-over and become eligible for the current event instance's draw. So long as the participant keeps interacting with the event's interaction (during an event instance) the participant's entries keep accumulating and are eligible for the next draw. The greater the number of entries a participant has the greater the chance a participant has of winning the draw.
- **All Points**—Points accumulate. Each time an individual participates in an interaction they are granted an entry (and potentially awarded points). Only points that are awarded during an event instance are eligible for an event instance draw. If you select **All Points**, then each time there is an event instance and a participant interacts with the event's interaction, all the participant's points from the event's previous instances roll-over and become eligible for the current event instance's draw. So long as the participant keeps interacting with the event's interaction (during an event instance) the participant's points keep accumulating and are eligible for the next draw. The greater the number of points the participant has the greater the chance the participant has of winning the draw.
- **Entries with each occurrence**—Each time an individual participates in an interaction they are granted an entry. Only entries that occur during an event instance are eligible for the event instance's draw. If you select **Entries with each occurrence**, then only entries that occur during a specific event instance

are eligible for that event instance’s draw. The greater the number of entries a participant has the greater the chance the participant has of winning the draw.

- **Points with each occurrence**—Each time an individual participates in an interaction they are granted an entry (and potentially awarded points). If you select **Points with each occurrence**, then only the points awarded for a specific event instance are eligible for the draw. The greater the number of points the participant has the greater the chance the participant has of winning the draw.
7. Return to the “Adding a Draw Event to a Campaign,” section on page 51 and complete the Notification tab.

4.10.5 Setting Up a Draw Event with a Daily Frequency

This section explains how to set up the Schedule tab for a Draw event with a daily frequency. You must first follow the steps in “Adding a Draw Event to a Campaign,” on page 51, and then follow the steps in this section.

To set up a draw event with a daily frequency:

1. From the **Frequency** drop-down menu, select the **Daily** frequency interval for this event.

Each event instance will run (the eligibility period) for 1 day. If multiple event instances exist, then they reoccur based on a day-pattern within the event’s start and end date and time range. The first event instance’s start date and time and the event’s reoccurrence pattern are set by the Execution Pattern field.

2. In the **Starts** field, enter a start date and time for this event. (Date and time are set to UTC.)

Under the Starts date and time fields the UI states that the Start date must be after a specific date and time. This date is determined by the earliest start date and time for the associated interactions.

3. Select an event execution pattern option. This option determines when the first event instance (eligibility period) and any following event instances occur:

- To execute the event based on the number of days elapsed, select the **Every** radio button and in the **days** field enter a number to represent the time interval (in days) to execute this event. For example, the first event instance starts at the event’s start date and time and ends 1 day later (the first eligibility period), then if you entered 12 into the days field, the next event instance occurs 12 days later.
- To execute the event based on a specified date and time, select the **On the following days** radio button, and then select the day or days-of-the-week checkboxes to execute this event. For example, if you select the **Sun** checkbox, then this event executes every Sunday. The first event executes on the first occurrence of a Sunday on or after the event start date and time and the last occurrence executes on the last occurrence of a Sunday on or before the event’s end date and time.

4. Select an event recurrence range option:

- To end the event execution after a specified number of instances, select the **Ends after** radio button. In the **Recurrence** field enter a number to represent how many times this event should occur before the event ends. For example, if you enter 10 into the Recurrence field, then this event will not end until it occurs 10 times (10 instances).
- To end the event execution on a specified date and time, select the **End by** radio button and enter a date and time to determine when the event ends. For example, if you entered 04/30/10 16:00:00 UTC, then this event ends on April 30th, 2010 at 16:00:00 UTC no matter how many times the event occurred.

Under the Ends date and time fields the UI states that the end date must be before a specific date and time. This date is determined by the latest end date and time for the associated interactions.

5. Select an execution date option (when the draw occurs):

- Select the **Upon the end of eligibility period** radio button to execute the draw at the end of the eligibility period.
- Enter a number and, from the drop-down menu, select **minutes**, **hours**, or **days** to represent how many minutes, days, or hours should transpire from the end of the eligibility period before the draw executes.

Note: When selecting the execution date and time, you should consider the fact that a SMS notification will be sent automatically to the winner, if you set up a notification on the Notifications tab.

6. From the **Participation** drop-down menu, select a participation mode. Which participation modes you can choose depend on the associated interaction's storyboards.

- **All Entries**—Entries accumulate. Each time an individual participates in an interaction they are granted an entry. Only entries that occur during an event instance are eligible for an event instance draw. If you select **All Entries**, then each time there is an event instance and a participant interacts with the event's interaction, all the participant's entries from the event's previous instances roll-over and become eligible for the current event instance's draw. So long as the participant keeps interacting with the event's interaction (during an event instance) the participant's entries keep accumulating and are eligible for the next draw. The greater the number of entries a participant has the greater the chance a participant has of winning the draw.
- **All Points**—Points accumulate. Each time an individual participates in an interaction they are granted an entry (and potentially awarded points). Only points that are awarded during an event instance are eligible for an event instance draw. If you select **All Points**, then each time there is an event instance and a participant interacts with the event's interaction, all the participant's points from the event's previous instances roll-over and become eligible for the current event instance's draw. So long as the participant keeps interacting with the event's interaction (during an event instance) the participant's points keep accumulating and are eligible for the next draw. The greater the number of points the participant has the greater the chance the participant has of winning the draw.

- **Entries with each occurrence**—Each time an individual participates in an interaction they are granted an entry. Only entries that occur during an event instance are eligible for the event instance’s draw. If you select **Entries with each occurrence**, then only entries that occur during a specific event instance are eligible for that event instance’s draw. The greater the number of entries a participant has the greater the chance the participant has of winning the draw.
 - **Points with each occurrence**—Each time an individual participates in an interaction they are granted an entry (and potentially awarded points). If you select **Points with each occurrence**, then only the points awarded for a specific event instance are eligible for the draw. The greater the number of points the participant has the greater the chance the participant has of winning the draw.
7. Return to the “Adding a Draw Event to a Campaign,” section on page 51 and complete the Notification tab.

4.10.6 Setting Up a Draw Event with a Weekly Frequency

This section explains how to set up the Schedule tab for a Draw event with a weekly frequency. You must first follow the steps in “Adding a Draw Event to a Campaign,” on page 51, and then follow the steps in this section.

To set up a draw event with a weekly frequency:

1. From the **Frequency** drop-down menu, select the **Weekly** frequency interval for this event.

Each event instance will run (the eligibility period) for 1 week. If multiple event instances exist, then they reoccur based on a week-pattern within the event’s start and end date and time range. The first event instance’s start date and time and the event’s reoccurrence pattern are set by the Execution Pattern field.

2. In the **Starts** field, enter a start date and time for this event. (Date and time are set to UTC.)

Under the Starts date and time fields the UI states that the Start date must be after a specific date and time. This date is determined by the earliest start date and time for the associated interactions.

3. Select an event execution pattern option. This option determines when the first event instance (eligibility period) and any following event instances occur:

- To execute the event based on the number of weeks elapsed, select the **Every** radio button and in the **weeks** field enter a number to represent the time interval (in weeks) to execute this event, and from the drop-down menu, select the day of the week on which the event should start. For example, the first event instance starts on the first occurrence of a Sunday on or after the event start date and time and it ends 1 week later (the first eligibility period), then if you entered 2 into the weeks field, the next event instance occurs 2 weeks later. The Recurrence Range options determine when the last instance occurs.

4. Select an event recurrence range option:

- To end the event execution after a specified number of instances, select the **Ends after** radio button. In the **Recurrence** field enter a number to represent

how many times this event should occur before the event ends. For example, if you enter 10 into the Recurrence field, then this event will not end until it occurs 10 times (10 instances).

- To end the event execution on a specified date and time, select the **End by** radio button and enter a date and time to determine when the event ends. For example, if you entered 04/30/10 16:00:00 UTC, then this event ends on April 30th, 2010 at 16:00:00 UTC no matter how many times the event occurred.

Under the Ends date and time fields the UI states that the end date must be before a specific date and time. This date is determined by the latest end date and time for the associated interactions.

5. Select an execution date option (when the draw occurs):

- Select the **Upon the end of eligibility period** radio button to execute the draw at the end of the eligibility period.
- Enter a number and, from the drop-down menu, select **minutes**, **hours**, or **days** to represent how many minutes, days, or hours should transpire from the end of the eligibility period before the draw executes.

Note: When selecting the execution date and time, you should consider the fact that a SMS notification will be sent automatically to the winner, if you set up a notification on the Notifications tab.

6. From the **Participation** drop-down menu, select a participation mode. Which participation modes you can choose depend on the associated interaction's storyboards.

- **All Entries**—Entries accumulate. Each time an individual participates in an interaction they are granted an entry. Only entries that occur during an event instance are eligible for an event instance draw. If you select **All Entries**, then each time there is an event instance and a participant interacts with the event's interaction, all the participant's entries from the event's previous instances roll-over and become eligible for the current event instance's draw. So long as the participant keeps interacting with the event's interaction (during an event instance) the participant's entries keep accumulating and are eligible for the next draw. The greater the number of entries a participant has the greater the chance a participant has of winning the draw.
- **All Points**—Points accumulate. Each time an individual participates in an interaction they are granted an entry (and potentially awarded points). Only points that are awarded during an event instance are eligible for an event instance draw. If you select **All Points**, then each time there is an event instance and a participant interacts with the event's interaction, all the participant's points from the event's previous instances roll-over and become eligible for the current event instance's draw. So long as the participant keeps interacting with the event's interaction (during an event instance) the participant's points keep accumulating and are eligible for the next draw. The greater the number of points the participant has the greater the chance the participant has of winning the draw.
- **Entries with each occurrence**—Each time an individual participates in an interaction they are granted an entry. Only entries that occur during an event

instance are eligible for the event instance’s draw. If you select **Entries with each occurrence**, then only entries that occur during a specific event instance are eligible for that event instance’s draw. The greater the number of entries a participant has the greater the chance the participant has of winning the draw.

- **Points with each occurrence**—Each time an individual participates in an interaction they are granted an entry (and potentially awarded points). If you select **Points with each occurrence**, then only the points awarded for a specific event instance are eligible for the draw. The greater the number of points the participant has the greater the chance the participant has of winning the draw.

7. Return to the “Adding a Draw Event to a Campaign,” section on page 51 and complete the Notification tab.

4.10.7 Adding an Instant Win Event to a Campaign

You can add an instant win event with one or more winning points to your campaign. You can set the number of instant win winning points, their reoccurrence frequency, the event execution date and time, and the number of winners.

To add an Instant Win event to a campaign:

1. On the mGage™ MS navigation bar, click **My Campaigns**.
2. The My Campaigns page appears and displays the All Campaigns list.
3. Double-click on the campaign to which you want to add the event.
4. The Campaign detail page opens and displays the Dashboard pane, which shows the campaign’s details.
5. In the left panel, click **Events**.
6. The Events panel opens. The Add Event section displays all the event types that are available for you to add.
7. Click the Instant Win event’s add button ().

The Instant Win Form page opens and displays three tabs; General, Schedule, and Notifications. By default, the General tab is active.

8. Click the **General** tab to enter Instant Win event information into the General section.
 - a. In the **Name** field, enter a unique event name.
 - b. In the Interaction section, select an interaction from the Available column, and then click the selection right arrow () button to move it into the Selected column. (You can remove an event from the Selected column using the selection left arrow () button.) The Available column only shows interactions that are either in the Configured or Running state.

You can select one or more interactions. The combined start and end dates and times of the interactions restrict the date and time range you can set for the event. In other words, the event must start and end within the combined interaction’s date and time range.

- c. In the **Prize** field, enter the prize description, for example, an iPod. If the event has multiple winning points, then this is the prize for each event winning point.
 - d. In the **Winners** field, enter the number of winners for this event (per winning point). If the event has multiple winning points, then this is the number of winners for each winning point. (For example, if an event has two winning points and you enter 2 in the Winners field, then in total there will be four winners.)
 - e. Select the **Award winners with** checkbox, enter a number in the text field, and then from the drop-down menu, select **Points**.
9. Click the **Schedule** tab to enter event information into the Schedule section. Part of setting up the schedule is to select an event mode. Depending on which mode interval you choose, the event time range and recurrence pattern information might differ. mGage™ MS currently provides the following modes:
- **Single Winning Points**—To set up an event to occur once, see “Setting Up an Instant Win Event with Single Winning Points,” on page 63.
 - **Recurrent Winning Points**—To set up an event with multiple winning points based on a time-pattern, see “Setting Up an Instant Win Event with Recurrent Winning Points,” on page 64.
 - **Random Winning Points**—To set up an event to repeat based on a random pattern, see “Setting Up an Instant Win Event with Random Winning Points,” on page 64.
10. Click the **Notifications** tab to enter event information into the Notifications section. Notifications are sent via SMS message.
- To notify a participant that he/she has won, select the **Send Winning Message** checkbox.
 - a. From the **Locales** drop-down menu, select a language. The available language options depend on the interactions for this event. Enter notification content for each locale.
 - b. From the **Insert Smart Field** drop-down menu, select a smart field or in the text field, enter the message to send to the event winners. Enter notification content for each locale.
 - c. Select the **Overwrite Service Message** checkbox, to only send this message instead of the message configured in the interaction’s storyboard. (Not selecting this checkbox means that both the interactions and the event messages are sent.)
 - To notify a participant that he/she is about to win, select the **Send About-to-Win** checkbox.
 - a. From the **Locales** drop-down menu, select a language. The available language options depend on the interactions for this event. Enter notification content for each locale.

- b. From the **Insert Smart Field** drop-down menu, select a smart field or in the text field, enter the message to send to the event winners. Enter notification content for each locale.
 - c. Select the **Overwrite Service Message** checkbox, to send only this message instead of the message configured in the interaction's storyboard. (Not selecting this checkbox means that both the interactions and the event messages are sent.)
 - d. To specify when to send this notification in relation to the instant win execution (for example, 1 hour before the instant win executes), enter a number and from the drop-down menu select hours, minutes, or seconds.
- To notify a participant that he/she just missed the prize, select the **Send Missed-to-Win** checkbox.
 - a. From the **Locales** drop-down menu, select a language. The available language options depend on the interactions for this event. Enter notification content for each locale.
 - b. From the **Insert Smart Field** drop-down menu, select a smart field or in the text field, enter the message to send to the event winners. Enter notification content for each locale.
 - c. Select the **Overwrite Service Message** checkbox, to send only this message instead of the message configured in the interaction's storyboard. (Not selecting this checkbox means that both the interactions and the event messages are sent.)
 - d. To specify when to send this notification in relation to the instant win execution (for example, 1 hour before the instant win executes), enter a number and from the drop-down menu select hours, minutes, or seconds.

11. Click **Apply** to save the event.

4.10.8 Setting Up an Instant Win Event with Single Winning Points

This section explains how to set up the Schedule tab for an Instant Win event with one winning point. You must first follow the steps in “Adding an Instant Win Event to a Campaign,” on page 61, and then follow the steps in this section.

To set up an instant win event with single winning points:

1. From the **Mode** drop-down menu, select the **Single winning points** option for this event. (In other words, this event occurs only once on the specified date and time.)
2. In the **Activation Date** section, in the **On** field, enter the date and time that this event executes. (Date and time are set to UTC.)
3. Return to the “Adding an Instant Win Event to a Campaign,” section on page 61 and complete the Notification tab.

4.10.9 Setting Up an Instant Win Event with Recurrent Winning Points

This section explains how to set up the Schedule tab for an Instant Win Event with recurring winning points. You must first follow the steps in “Adding an Instant Win Event to a Campaign,” on page 61, and then follow the steps in this section.

To set up an instant win event with recurrent winning points:

1. From the **Mode** drop-down menu, select the **Recurrent Winning Points** option for this event. (How often winning points occur and how many winning points there are for the event is set in the Winning Points field.)
2. Enter the **Activation Date** range:
 - a. In the **Starts** field, enter a start date and time for this event. (Date and time are set to UTC.)
 - b. In the **Ends** field, enter an end date and time for this event. (Date and time are set to UTC.)

Note: The UI states that the start and end dates and times must be before a specific date and time and after a specific date and time. These dates and times are determined by the earliest and latest start and end dates and times for the associated interactions.

3. In the Winning Points section, in the **Place every** field, enter an winning point recurrence number, then from the drop-down menu, select a recurrence type; Weeks, Days, Hours, Minutes, or Seconds. For example, if you enter 2 in the Place every field and select Weeks, then winning points will occur every 2 weeks, from the start date and time until the end date and time.
4. The Total Win Points field automatically calculates and displays the total number of wining point instances based on the values you entered into the Activation Date (event start and end dates) and Winning Points sections. For example, if you set Place every to 1 and select Hours, and the event starts on 6/12/2010, at 10:10:10 UTC and ends on 6/13/2010, at 9:59:59 UTC, then the Total Win Points field displays 24.
5. If you want to propagate prizes that were not awarded for a winning point to the next winning point, then select the **Propagate prizes to the next winning point** checkbox. For example, if no prizes were awarded for the first winning point, then the second winning point will have its own prizes plus the non-awarded prizes from the first winning point. If you do not select this checkbox, then all non-awarded prizes remain not awarded.
6. Return to the “Adding an Instant Win Event to a Campaign,” section on page 61 and complete the Notification tab.

4.10.10 Setting Up an Instant Win Event with Random Winning Points

This section explains how to set up the Schedule tab for an Instant Win Event with one winning point. You must first follow the steps in “Adding an Instant Win Event to a Campaign,” on page 61, and then follow the steps in this section.

To set up an instant win event with random winning points:

1. From the **Mode** drop-down menu, select the **Random Winning Points** option for this event. (How often winning points occur and how many winning points there are for the event is set in the Winning Points field.)
2. Enter the **Activation Date** range:
 - a. In the **Starts** field, enter a start date and time for this event. (Date and time are set to UTC.)
 - b. In the **Ends** field, enter an end date and time for this event. (Date and time are set to UTC.)

Note: The UI states that the start and end dates and times must be before a specific date and time and after a specific date and time. These dates and times are determined by the earliest and latest start and end dates and times for the associated interactions.

3. In the Winning Points section, in the **Place** field, enter a winning point recurrence number. For example, if you enter 2 in the Place field, then only 2 winning points will occur randomly, between the start date and time and the end date and time.
4. If you want to propagate prizes that were not awarded for a winning point to the next winning point, then select the **Propagate prizes to the next winning point** checkbox. For example, if no prizes were awarded for the first winning point, then the second winning point will have its own prizes plus the non-awarded prizes from the first winning point. If you do not select this checkbox, then all non-awarded prizes remain not awarded.
5. Return to the “Adding an Instant Win Event to a Campaign,” section on page 61 and complete the Notification tab.

4.10.11 Viewing an Event

You can view an event from the My Campaigns tab by selecting the event’s campaign, and then, in the left panel, clicking Event to open the Event Dashboard page.

To view an event:

1. On the mGage™ MS navigation bar, click **My Campaigns**.
The My Campaigns page appears and displays the All Campaigns list.
2. Double-click on the campaign that includes the event you want to view.
The Campaign detail page opens and displays the Dashboard pane, which shows the campaign’s details.
3. On the left panel, click **Events**.
The Events panel opens.
4. Double-click on the event to open the event’s properties panel.
The properties panel opens and displays all the event’s details.

4.10.12 Editing an Event

From the My Campaigns tab, you can edit one instance or all instances of an event that is in the Scheduled, Running, or Paused state.

To edit an event:

1. On the mGage™ MS navigation bar, click **My Campaigns**.
The My Campaigns page appears and displays the All Campaigns list.
2. Double-click on the campaign that includes the event you want to edit.
The Campaign detail page opens and displays the Dashboard pane, which shows the campaign's details.
3. On the left panel, click **Events**.
The Events panel opens.
4. Double-click on the event to open the event's properties panel.
5. Click **Edit**.
If this is a Draw event, then a dialog window opens and asks whether to edit only this occurrence or all occurrences of the event.
6. Select a edit option, and then click **OK**:
 - Edit this occurrence only
 - Edit all occurrences
 The event form opens and displays all the event's details.
7. You can edit all the event fields. (See “Adding Campaign Events,” on page 50 for more information about event fields.)
8. To save any changes you made, click **Apply**.

4.10.13 Pausing an Event

From the My Campaigns tab, you can pause one instance or all instances of an Instant Win event that is in the Running state.

To pause an event:

1. On the mGage™ MS navigation bar, click **My Campaigns**.
The My Campaigns page appears and displays the All Campaigns list.
2. Double-click on the campaign that includes the event you want to pause.
The Campaign detail page opens and displays the Dashboard pane, which shows the campaign's details.
3. On the left panel, click **Events**.
The Events panel opens.
4. Double-click on the event to open the event's properties panel.
5. Click **Pause**.

The properties panel closes and the event displays a Paused status in the list of events.

4.10.14 Executing a Manual Event

From the My Campaigns tab, you can execute a manual Draw event once it has the Pending status.

To execute a manual event:

1. On the mGage™ MS navigation bar, click **My Campaigns**.
The My Campaigns page appears and displays the All Campaigns list.
2. Double-click on the campaign that includes the event you want to execute.
The Campaign detail page opens and displays the Dashboard pane, which shows the campaign's details.
3. On the left panel, click **Events**.
The Events panel opens.
4. Double-click on the event to open the event's properties panel.
5. Click **Execute**.
The properties panel closes. The event's schedule column displays the execution date and time and the status column displays Executed.

4.10.15 Resuming a Paused Event

From the My Campaigns tab, you can resume a paused Instant Win event.

To resume an event:

1. On the mGage™ MS navigation bar, click **My Campaigns**.
The My Campaigns page appears and displays the All Campaigns list.
2. Double-click on the campaign that includes the event you want to resume.
The Campaign detail page opens and displays the Dashboard pane, which shows the campaign's details.
3. On the left panel, click **Events**.
The Events panel opens.
4. Double-click on the event to open the event's properties panel.
5. Click **Resume**.
The properties panel closes and the event displays as running in the list of events.

4.10.16 Canceling an Event

From the My Campaigns tab, you can cancel one instance or all instances of an event that is in the Running state (and in the Scheduled state, if it is a Draw event).

To cancel an event:

1. On the mGage™ MS navigation bar, click **My Campaigns**.

The My Campaigns page appears and displays the All Campaigns list.

2. Double-click on the campaign that includes the event you want to cancel.

The Campaign detail page opens and displays the Dashboard pane, which shows the campaign's details.

3. On the left panel, click **Events**.

The Events panel opens.

4. Double-click on the event to open the event's properties panel.

5. Click **Cancel**.

If this is a Draw event, then a dialog window opens and asks whether to cancel all occurrences of the event or only this occurrence.

6. Select a cancelation option, and then click **OK**:

- Cancel this occurrence only
- Cancel all occurrences

The properties panel closes and the event no longer shows in the list of events.

4.10.17 Deleting an Event

From the My Campaigns tab, you can delete one instance or all instances of an event; for a Draw event, if it is in the Cancelled state, and for an Instant Win event, if it is in the Scheduled state.

To delete an event:

1. On the mGage™ MS navigation bar, click **My Campaigns**.

The My Campaigns page appears and displays the All Campaigns list.

2. Double-click on the campaign that includes the event you want to delete.

The Campaign detail page opens and displays the Dashboard pane, which shows the campaign's details.

3. On the left panel, click **Events**.

The Events panel opens.

4. Double-click on the event to open the event's properties panel.

5. Click **Delete**.

If this is a Draw event, then a dialog window opens and asks whether to delete all occurrences of the event or only this occurrence.

6. Select a delete option, and then click **OK**:

- Delete this occurrence only
- Delete all occurrences

The properties panel closes and the event no longer shows in the list of events.

4.10.18 Filtering Events on the Campaign (Detail) Events Pane

You can filter which events appear in the Campaigns detail Events pane. For example, you can view all existing events or you can filter events by time range, interaction name, interaction status, and event type.

To filter all events by time range:

1. From the mGage™ MS Navigation bar, click **My Campaigns**.

The My Campaigns page appears and displays the All Campaigns list.

2. Filter the All Campaigns list of campaigns (in the left panel, use the by brand and by interaction status filters, and under the local navigation bar, use the time-range filters) to locate the campaign, and then double-click on the campaign.

The Campaign detail page opens and displays the Dashboard pane, which shows the campaign's details.

3. In the left panel, click **Events**.

The Campaign detail page refreshes and displays the Events pane, which shows the campaign's events.

4. Select a time-driven filter option; All, Today, This Week, This Month, 24 Hours, 7 Days, 30 Days, or Custom. Use these time-driven filtering options to display only events that are scheduled to *start* running during the specified time range.

- **All**—To view all events, click the **All** time range filter option.
- **Today**—To view events that are scheduled to start running today, click the **Today** time range filter option. (Today is defined as one second past midnight to midnight. For example, from 07:30:2010 00:00:01 to 07:30:2010 24:00:00.)
- **This Week**—To view events that are scheduled to start running this week, click the **This Week** time range filter option. (This Week is defined as one second past midnight (Sunday morning) to midnight Saturday. For example, from 07:25:2010 00:00:01 to 07:31:00 24:00:00.)
- **This Month**—To view events that are scheduled to start running this month, click the **This Month** time range filter option. (This month is defined as one second past midnight (morning of the first day of the month) to midnight on the last day of the month. For example, from 07:01:2010 00:00:01 to 07:31:2010 24:00:00.)
- **24h**—To view events that were scheduled to start running in the past 24 hours, click the **24h** time range filter option. (24h is defined as the previous 24 hours from the current time. For example, if the current time is 07:25:2010 08:00:01, then selecting 24h displays the events that started running between 07:24:2010 08:00:00 and 07:25:2010 08:00:01.)
- **7d**—To view events that were scheduled to start running in the past 7 Days, click the **7d** time range filter option. (7d is defined as the previous 7 days from the current date and time. For example, if the current date and time is 07:26:2010 08:00:01, then selecting 7d displays the events that started running between 07:20:2010 08:00:00 and 07:26:2010 08:00:01.)

- **30d**—To view events that were scheduled to start running in the past 30 days, click the **30d** time range filter option. (30d is defined as the previous 30 days from the current date and time. For example, if the current date and time is 07:31:2010 08:00:01, then selecting 30d displays the events that started running between 07:01:2010 08:00:00 and 07:31:2010 08:00:01.)
- **Custom**—To view events based on your own custom date range, click the **Custom** time range option, and then enter a date range.

The events list refreshes and displays all events that start within the specified date and time range.

5. To the right of the time-driven filtering options are additional filtering options; previous (left arrow icon, ) and next (right arrow icon, ). Click on these icons to display events that match a specific time range's previous or next time range.

For example, click **30d** to display all events that match the past 30 days time range. The events for the past 30 days time range displays, for example, **From 13 Mar 2010 Till 12 Apr 2010**. Next, click the previous arrow icon (left arrow icon, ) to display all events that match the previous 30 days to the past 30 days, for example, **From 11 Feb 2010 Till 13 Mar 2010**.

6. You can sort the events list by any of the event list's column headings, for example, event start or end date.

To filter events by event type:

1. From the mGage™ MS Navigation bar, click **My Campaigns**.

The My Campaigns page appears and displays the All Campaigns list.

2. Filter the All Campaigns list of campaigns (in the left panel, use the by brand and by interaction status filters, and under the local navigation bar, use the time-range filters) to locate the campaign, and then double-click on the campaign.

The Campaign detail page opens and displays the Dashboard pane, which shows the campaign's details.

3. In the left panel, click **Events**.

The Campaign detail page refreshes and displays the events pane, which shows the campaign's events.

4. To filter the events list to show only one type of event, from the **View** drop-down menu (located on the local navigation bar), select an event type:

- All
- Draws
- Instant Wins

The events list resorts and lists, in alphanumeric order, only the events that are the selected event type.

You can sort the events list by any of the event list's column headings (except the interaction column), for example, name, schedule, or status.

To filter events by interaction:

1. From the mGage™ MS Navigation bar, click **My Campaigns**.

The My Campaigns page appears and displays the All Campaigns list.

2. Filter the All Campaigns list of campaigns (in the left panel, use the by brand and by interaction status filters, and under the local navigation bar, use the time-range filters) to locate the campaign, and then double-click on the campaign.

The Campaign detail page opens and displays the Dashboard pane, which shows the campaign's details.

3. In the left panel, click **Events**.

The Campaign detail page refreshes and displays the events pane, which shows the campaign's events.

4. To filter the events list to show only events that are associated with a particular interaction, in the left panel, click on the **By Interaction** tab, and then click on the interaction name.

The events list resorts and lists, in alphanumeric order, only the events associated with the selected interaction name.

You can sort the events list by any of the event list's column headings (except the interaction column), for example, name, schedule, or status.

To filter events by interaction status:

1. From the mGage™ MS Navigation bar, click **My Campaigns**.

The My Campaigns page appears and displays the All Campaigns list.

2. Filter the All Campaigns list of campaigns (in the left panel, use the by brand and by interaction status filters, and under the local navigation bar, use the time-range filters) to locate the campaign, and then double-click on the campaign.

The Campaign detail page opens and displays the Dashboard pane, which shows the campaign's details.

3. In the left panel, click **Events**.

The Campaign detail page refreshes and displays the Events pane, which shows the campaign's events.

4. To filter the events list to show only events that are associated with interactions of a particular interaction status, in the left panel, click on the **By Status** tab, and then click on the status name.

The events list resorts and lists, in alphanumeric order, only the events associated with the selected interaction name.

You can sort the events list by any of the event list's column headings (except the interaction column), for example, name, schedule, or status.

4.11 Campaign (Detail) Analytics Pane

This section describes the Campaign detail Analytics pane. Use the Campaign detail Analytics pane to analyze your campaign.

You can access all the other Campaign detail panes (Dashboard, Interactions, and Events) from the left panel.

See “Using the Campaign (Detail) Analytics Pane,” on page 73, for the various tasks you can perform from the Campaign detail Analytics pane.

To access a campaign’s analytics pane:

1. From the mGage™ MS Navigation bar, click **My Campaigns**.

The My Campaigns page appears and displays the All Campaigns list.

2. Filter the All Campaigns list of campaigns (in the left panel, use the by brand and by interaction status filters, and under the local navigation bar, use the time-range filters) to locate the campaign, and then double-click on the campaign.

The Campaign detail page opens and displays the Dashboard pane, which shows the campaign’s details.

3. In the left panel, click **Analytics**.

The Campaign detail page refreshes and displays the Analytics pane, which shows how your campaign’s interactions are performing.

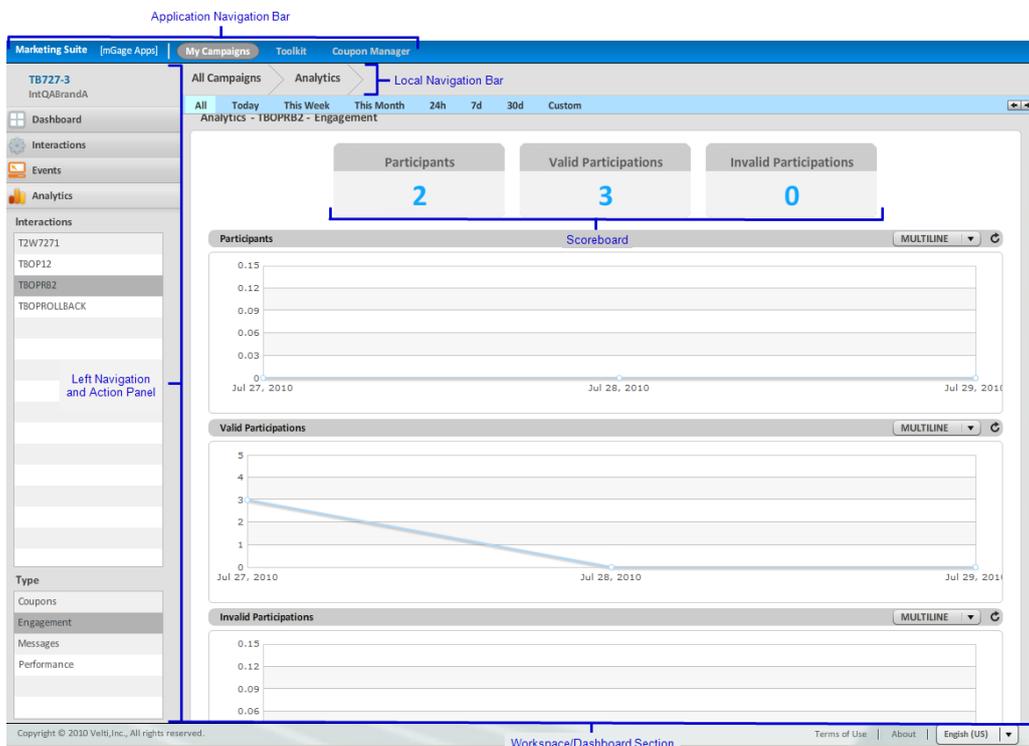


Figure 28 - Campaign (Detail) Analytics Pane

The Campaign detail page’s Analytics pane includes the following sections:

- **Local Navigation Bar**—Displays **All Campaigns > Analytics**. You can click **All Campaigns** to go back to the My Campaigns page.
- **Left navigation and action panel**—In the Interactions section, there is a list of the interactions associated with the campaign. Click on an interaction name to refresh the dashboard/workspace with analytic information for the selected interaction.

In the Type section, there is a list of different types of analytical data; Coupons, Engagement, Messages, and Performance. Click on an analytic type to refresh the dashboard/workspace with analytic information for the selected analytic type.

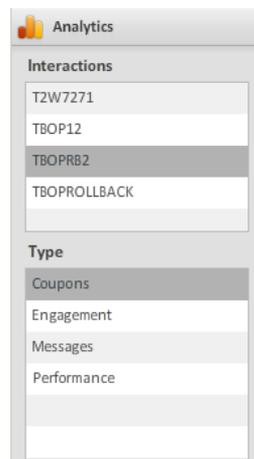


Figure 29 - Left Navigation and Action Panel (Campaign Analytics)

- **Workspace/dashboard section**—The campaign analytics dashboard displays campaign coupon, engagement, message, and performance data, at the interaction level, in a graphical format. It also includes a performance scoreboard. Use the Interactions filter option, in the left navigation panel, to select an interaction and displays its analytic data in the analytics dashboard. The type of data that appears depends on the filtering option you select in the left navigation panel’s Type section. For example, if you select the Message type, the analytics dashboard refreshes to display information about the selected interaction’s messages. You can also use the time-driven filter options to view analytic information for different time ranges.
 - **Coupons**—Displays the selected interaction’s coupon statistics.
 - **Engagement**—Displays the selected interaction’s participation statistics.
 - **Messages**—Displays the selected interaction’s message statistics.
 - **Performance**—Displays the selected interaction’s help and stop request statistics.

Note: When you select the refresh icon (🔄), data is typically no older than 30 seconds.

4.12 Using the Campaign (Detail) Analytics Pane

You can perform the following tasks from the Campaign detail Analytics pane:

- “Viewing a Campaign’s Coupon Analytics,” on page 74.
- “Viewing a Campaign’s Engagement (Participation) Analytics,” on page 75.
- “Viewing a Campaign’s Messages Analytics,” on page 76.
- “Viewing a Campaign’s Performance Analytics,” on page 77.

4.12.1 Viewing a Campaign's Coupon Analytics

You can view your campaign's coupon analytics per interaction. Only interactions with coupons show coupon analytics.

To analyze your campaign's coupons by interaction:

1. From the mGage™ MS Navigation bar, click **My Campaigns**.

The My Campaigns page appears and displays the All Campaigns list.

2. Filter the All Campaigns list of campaigns (in the left panel, use the by brand and by interaction status filters, and under the local navigation bar, use the time-range filters) to locate the campaign, and then double-click on the campaign.

The Campaign detail page opens and displays the Dashboard pane, which shows the campaign's details.

3. In the left panel, click **Analytics**.

The Campaign detail page refreshes and displays the Analytics pane, which shows how your campaign's interactions are performing. By default, the Analytics pane displays the Coupon analytics type.

4. In the left panel, in Interactions section, select the interaction for which you want to view coupon statistics.

The workspace/dashboard refreshes and displays the coupon statistics for the selected interaction.

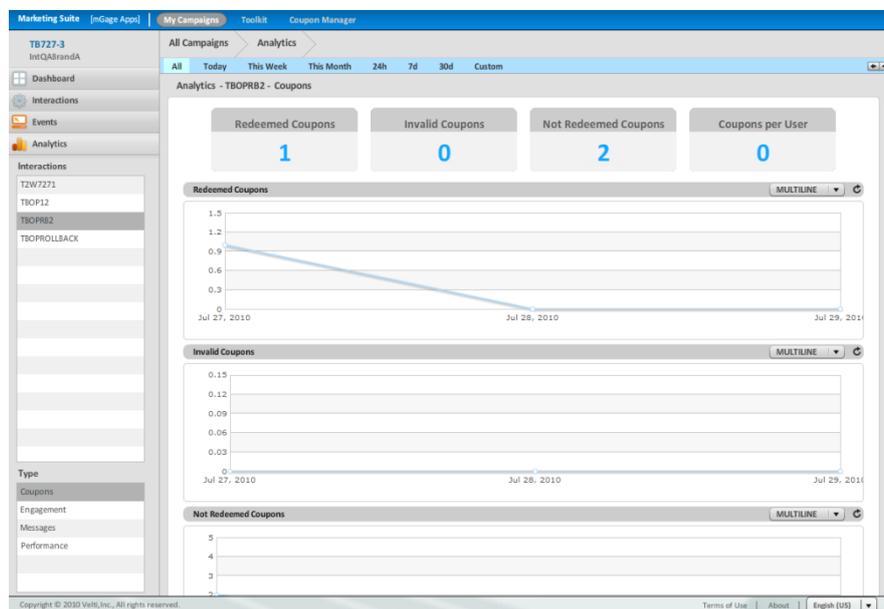


Figure 30 - Campaign (Detail) Analytics Pane-Coupons View

The Analytics pane's Coupons view includes the following sections:

- **Coupon Scoreboard**—Displays the total number of redeemed coupons, invalid coupons, not redeemed coupons, and coupons per user for the selected interaction. The Redeemed Coupons number is the total number of coupons redeemed to date. The Invalid Coupons number is the total number of coupons, to date, that were sent for redemption, but which were not redeemed because they were invalid

coupons. The Not Redeemed Coupons number is the total number of coupons, to date, that were sent for redemption, but which were not redeemed because they did not comply with the coupon category's redemption policy. The Coupons per User number is the average number of coupons redeemed per user to date.

- **Coupons Graphs**—Displays four graphics; Redeemed Coupons, Invalid Coupons, Not Redeemed Coupons, and Redeemed versus Invalid Coupon, which show cumulative data over time.

4.12.2 Viewing a Campaign's Engagement (Participation) Analytics

You can view your campaign's engagement (participation) analytics per interaction.

To view your campaign's engagement statistics by interaction:

1. From the mGage™ MS Navigation bar, click **My Campaigns**.

The My Campaigns page appears and displays the All Campaigns list.

2. Filter the All Campaigns list of campaigns (in the left panel, use the by brand and by interaction status filters, and under the local navigation bar, use the time-range filters) to locate the campaign, and then double-click on the campaign.

The Campaign detail page opens and displays the Dashboard pane, which shows the campaign's details.

3. In the left panel, click **Analytics**.

The Campaign detail page refreshes and displays the Analytics pane, which shows how your campaign's interactions are performing. By default, the Analytics pane displays the Coupons analytics type.

4. In the left panel, in Interactions section, select the interaction for which you want to view engagement statistics.
5. In the left panel, in the Type section, select **Engagement** (if it is not already selected).

The workspace/dashboard refreshes and displays the engagement statistics for the selected interaction.

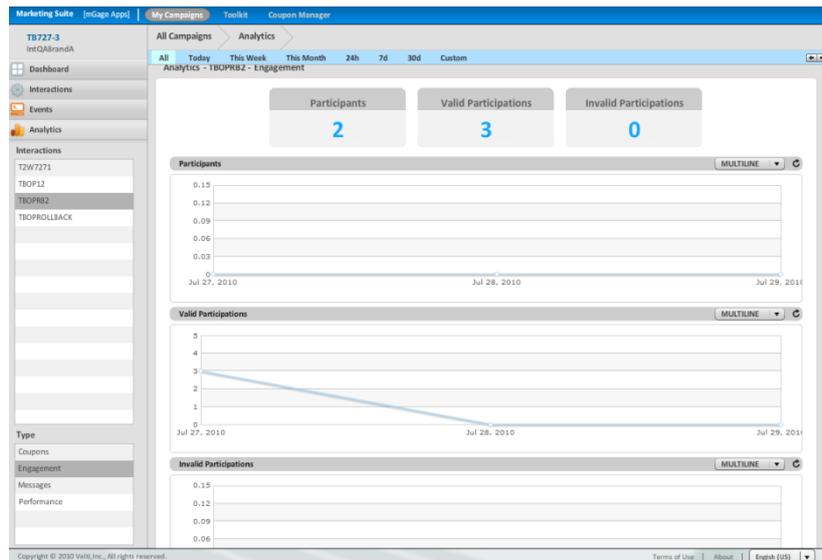


Figure 31 - Campaign (Detail) Analytics Pane-Engagement View

The Analytics pane's Engagement view includes the following sections:

- **Participant/Participation Scoreboard**—Displays the total number of participants, valid participations, and invalid participations for the selected interaction. The Participants number is the total number of unique participants to date for the interaction. The Valid Participations number is the total number of valid entries/opt-ins to date. The Invalid Participations number is the total number of invalid entries/opt-ins to date. (A participation is invalid if the interaction uses coupons and the participant tried to redeem an invalid coupon.)
- **Participant/Participation Graphs**—Displays three graphics; Participants, Valid Participations, and Invalid Participations, which show cumulative data over time. The Participants graph shows the total number of unique participants for the interaction to date. The Valid Participations graph shows the total number of valid participations for the interaction to date. The Invalid Participations graph shows the total number of invalid participations for the interaction to date.

4.12.3 Viewing a Campaign's Messages Analytics

You can view your campaign's message (send/received) analytics per interaction.

To view your campaign's message statistics by interaction:

1. From the mGage™ MS Navigation bar, click **My Campaigns**.

The My Campaigns page appears and displays the All Campaigns list.

2. Filter the All Campaigns list of campaigns (in the left panel, use the by brand and by interaction status filters, and under the local navigation bar, use the time-range filters) to locate the campaign, and then double-click on the campaign.

The Campaign detail page opens and displays the Dashboard pane, which shows the campaign's details.

3. In the left panel, click **Analytics**.

The Campaign detail page refreshes and displays the Analytics pane, which shows how your campaign's interactions are performing. By default, the Analytics pane displays the Coupons analytics type.

4. In the left panel, in Interactions section, select the interaction for which you want to view engagement statistics.
5. In the left panel, in the Type section, select **Messages**.

The workspace/dashboard refreshes and displays the messages statistics for the selected interaction.

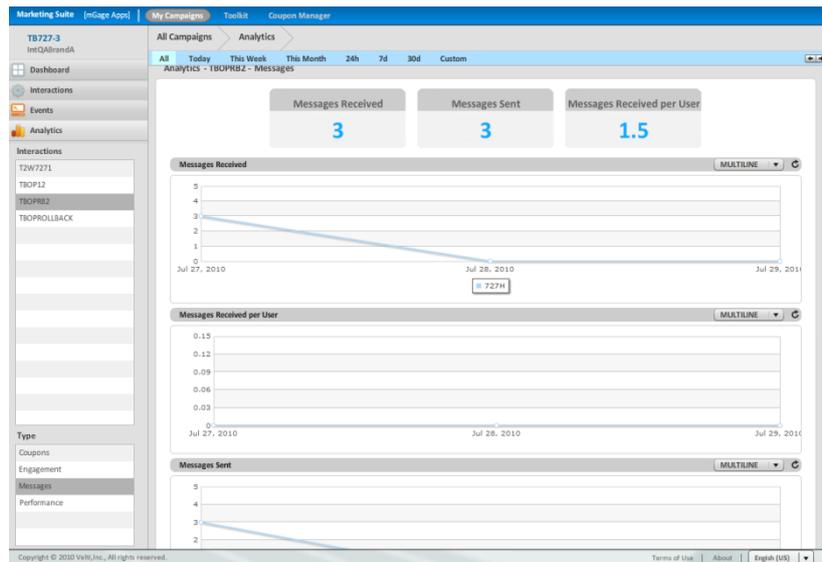


Figure 32 - Campaign (Detail) Analytics Pane-Messages View

The Analytics pane's Messages view includes the following sections:

- **Messages Scoreboard**—Displays the total number of messages received, the total number of messages sent, and the average number of messages received per user for the selected interaction.
- **Messages Graphs**—Displays three graphics; Messages Received, Messages Received per User, and Messages Sent, which show cumulative data over time.

4.12.4 Viewing a Campaign's Performance Analytics

You can view your campaign's performance (help and stop requests) analytics per interaction.

To view your campaign's performance statistics by interaction:

1. From the mGage™ MS Navigation bar, click **My Campaigns**.

The My Campaigns page appears and displays the All Campaigns list.

2. Filter the All Campaigns list of campaigns (in the left panel, use the by brand and by interaction status filters, and under the local navigation bar, use the time-range filters) to locate the campaign, and then double-click on the campaign.

The Campaign detail page opens and displays the Dashboard pane, which shows the campaign's details.

3. In the left panel, click **Analytics**.

The Campaign detail page refreshes and displays the Analytics pane, which shows how your campaign's interactions are performing. By default, the Analytics pane displays the Coupons analytics type.

4. In the left panel, in Interactions section, select the interaction for which you want to view engagement statistics.

5. In the left panel, in the Type section, select **Performance**.

The workspace/dashboard refreshes and displays the performance statistics for the selected interaction.

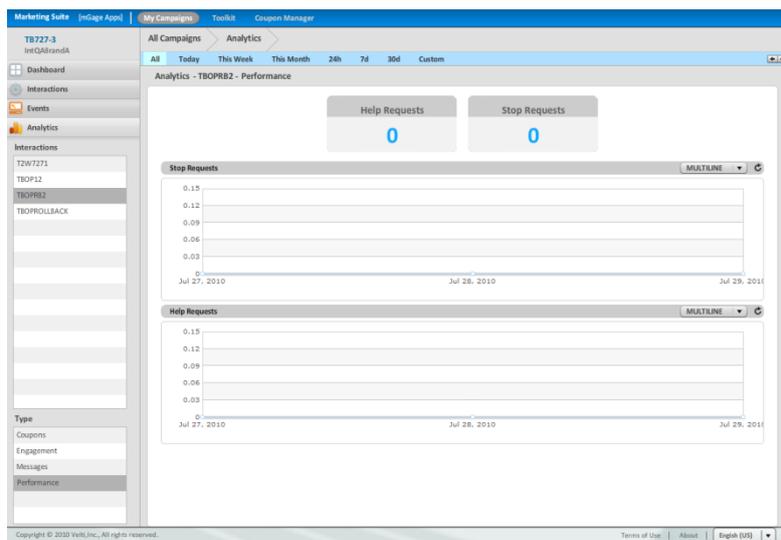


Figure 33 - Campaign (Detail) Analytics Pane-Performance View

The Analytics pane's Performance view includes the following sections:

- **Help/Stop Requests Scoreboard**—Displays the total number of help messages received and the total number of stop messages received for the selected interaction.
- **Help/Stop Requests Graphs**—Displays two graphics; Stop Requests and Help Requests, which show cumulative data over time.

5 Toolkit

The mGage™ MS application provides a number of toolkits for developing interaction templates (or storyboard templates). With these toolkits you can set up interaction templates that guide users who create campaign interactions. Interaction templates provide the benefit of coordinating and standardizing the efforts of multiple users who create interactions. Another benefit of interaction templates is that templates reduce the effort of repeatedly creating the same or similar interactions. Instead you can set up an interaction template once and reuse it to create custom campaign interactions.

5.1 Toolkit Interface

This section describes the Toolkit interface in detail. See “Using the Toolkit Interface,” on page 81 for the various tasks you can perform using the Toolkit interface.

To access the Toolkit functions:

1. From the mGage™ MS application navigation bar, click **Toolkit**.

The Toolkit page appears.

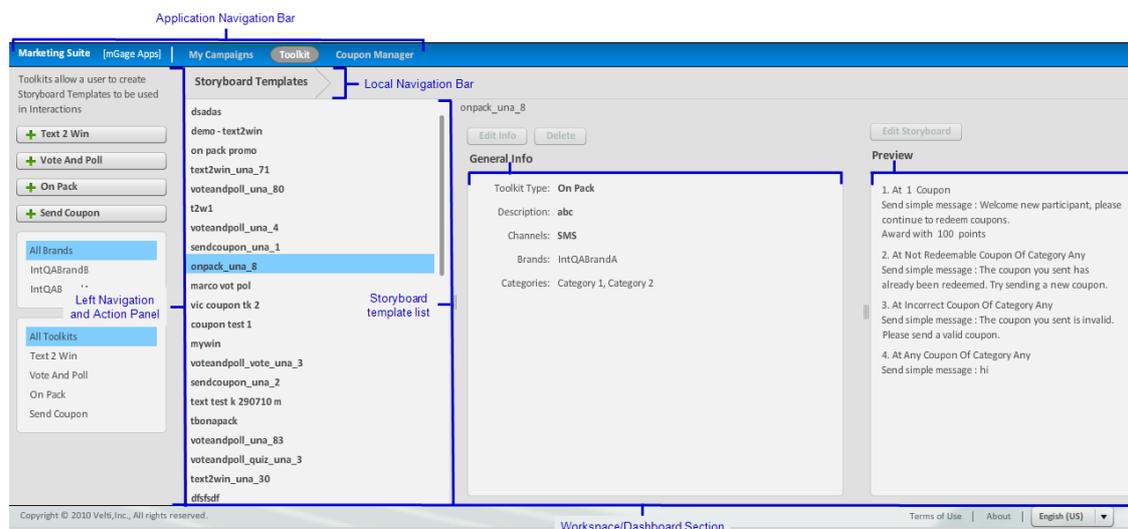


Figure 34 -Toolkit Interface

The Toolkit page includes the following sections:

- **Local navigation bar**—Displays **Storyboard Templates**. Use this navigation bar to understand where you are within the Toolkits process. Click on **Storyboard Templates**, on the local navigation bar, to return to the Toolkit page at any time.
- **Left navigation and action panel**—Includes create buttons for the various interaction toolkits; Text 2 Win, Vote And Poll, On Pack, and Send Coupon. Click on a create interaction template button to open the Create New... page. Beneath the create interaction template buttons there are filtering options for the Storyboard Templates list; by brand and by toolkit. Click on a brand or toolkit filtering option

to refresh the Storyboard Templates list with only interaction templates that match your filtering selection.

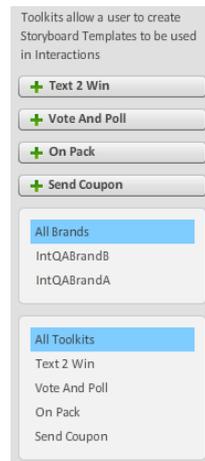


Figure 35 - Left Navigation and Action Panel (Toolkit)

- **Workspace/dashboard section**—The Toolkit workspace is divided into three sections; the Storyboard Template list, the interaction template General Info section, and the Preview section.
 - **Storyboard templates list**—Displays all the existing interaction templates. Use the filtering options in the left panel to manipulate what appears in the list. Click on an interaction template to view its high-level information in the General Info section and preview its storyboard details in the Storyboard section.
 - **General Info section**—Displays the selected interaction template’s high-level information, for example, the interaction template toolkit type that was used to create the interaction template, the brands associated with the interaction template, and the channels the interaction template was set up to run on. In addition there are two action buttons; Edit Info and Delete. Click **Edit Info** to open the General Info fields for editing. Click **Delete** to delete the interaction template. (You can only edit or delete interaction templates that your user account created, and only if the interaction template has not been used yet to create an interaction for a campaign.)
 - **Preview**—Displays the interaction template’s storyboard outline (similar to the Preview Interactions section on the Storyboard Dialog Configuration page). In addition, there is an Edit Storyboard button. Click **Edit Storyboard** to open the Storyboard Dialog Configuration page and add or edit the interaction templates storyboard dialogs. (You can edit or delete only interaction templates that your user account created, and only if the interaction template has not been used yet to create an interaction for a campaign.)

5.2 Using the Toolkit Interface

You can perform the following tasks from the Toolkit page:

- “Creating an Interaction Template,” on page 81.
- “Viewing an Interaction Template,” on page 107.
- “Editing an Interaction Template,” on page 107.
- “Publishing an Interaction Template,” on page 108.

5.2.1 Creating an Interaction Template

You can create an interaction template and publish it so that other users can use it to add interactions to a campaign (if the campaign is associated with the same brand as the template). When you create an interaction template you set out the steps and storyboard for the interaction. Users that use this interaction template to add an interaction to their campaign cannot alter the dialog steps. Only users with access to the brands you associate this template with can use this interaction template to create a campaign’s interaction.

You can create the following interaction templates from the Toolkit page:

- **Text 2 Win**—see “Creating a Text 2 Win Interaction Template,” on page 81.
- **Vote And Poll**—see “Creating a Vote And Poll Template,” on page 88.
- **On Pack**—see “Creating an On Pack Template,” on page 93.
- **Send Coupon**—see “Creating a Send Coupon Template,” on page 100101.

5.2.2 Creating a Text 2 Win Interaction Template

This section describes how to create a Text 2 Win interaction template (add the general information and configure the storyboard). Also included are explanations for each of the storyboard conditions and actions.

- “Adding the Text 2 Win Template,” on page 81.
- “Configuring the Text 2 Win Template Storyboard,” on page 82.
- “About Text 2 Win Interaction Storyboard Options,” on page 85.

Adding the Text 2 Win Template General Information

Create the interaction template and enter the template’s general information.

To create a Text 2 Win template:

1. On the mGage™ MS navigation bar, click **Toolkit**.
The Toolkit page appears.
2. In the left panel, click **Text 2 Win**.
The Create New Text 2 Win Template page appears.
3. Enter the interaction template name and description.
 - a. In the **Name** field, enter the interaction template name.

- b. In the **Description** field, enter a description for this interaction template.
4. In the **Brands** section, select a brand in the Available list and move it to the Selected list using the right arrow button (). You can select one or more brands. To remove a brand from the Selected list use the left arrow button ().

Note: Selecting a brand here determines which brands you can publish this interaction template to. Only users that have access to these brands can use this interaction template.

5. In the **Channels** section, select the type of channel you want this interaction template to run on. You can select one or more channels. The options are:
 - SMS
 - WAP (in future release)
 - WEB (in future release)
 - Email (in future release)
6. Click **Create Storyboard**.

The Toolkit page appears (Storyboard Templates) and the new interaction template appears in the Storyboard Templates list. In the General Info section, you can view the information that you just entered for the interaction template.

7. To edit the storyboard, select the interaction template, and then click **Edit Storyboard**.

The Storyboard Dialog Configuration page appears.

8. To configure the interaction template's Storyboard, see "Configuring the Text 2 Win Template Storyboard," on page 82.

Configuring the Text 2 Win Template Storyboard

After you create the general information for the interaction template, you configure the storyboard.

NOTE: Each time an individual engages with an interaction, whether it is via sending an SMS message or by clicking on a banner, the individual is granted an entry. To simplify how to refer to the numerous possible methods of engaging with an interaction, when creating templates, this User Guide will refer to all methods as "sends an entry" although the individual is actually granted an entry.

To configure the Text 2 Win template storyboard:

1. On the mGage™ MS navigation bar, click **Toolkit**.
The Toolkit page appears and displays the Storyboard Template list.
2. Select the interaction template to configure and click **Edit Storyboard**.
The Storyboard Dialog Configuration page appears.
3. You can add as many conditions, actions, or dialogs that makes sense for your storyboard.

IMPORTANT: Each storyboard must have a dialog with either an At Any Entry or an At Any Participation condition (and a corresponding action). This guarantees that every individual that interacts with the interaction will trigger an action.

A condition determines when an action occurs. For example, when to send a message or award points to a participant. An action is the response to an entry, participation, or participant counting. For example, you can send a message or send a message and award points to the participant. A dialog is a combination of a condition and an action. There are several pre-defined dialogs, see “Table 5 - Text 2 Win Interaction Template Dialog Options” on page 87, which you can customize. You can choose to use a pre-defined dialog or create your own dialog. Each user-defined dialog must have only one condition and at least one or more actions.

- See “Table 3 - Text 2 Win Interaction Template Condition Options,” on page 85, for a list of possible condition options.
- See “Table 4 - Text 2 Win Interaction Template Action Options,” on page 87, for a list of possible action options.
- See “Table 5 - Text 2 Win Interaction Template Dialog Options,” on page 87, for a list of possible dialog options.

As the Text 2 Win template storyboard can be configured in many different ways, the remainder of this section shows some examples.

- **Example 1**—Adding a pre-defined dialog:
 - a. In the Dialogs section, click the **Add** button for one of the dialog options. (See Table 5 - Text 2 Win Interaction Template Dialog Options” on page 87, for the possible options.) In this example, select the Welcome Dialog with Points **Add** button.

The middle panel populates with the pre-defined dialog and its default settings. To the right, the Preview Interactions section describes the dialog. The dialog has three parts; one condition (At Nth Entry) and two actions (Send simple message and Award with points). If you look at the Conditions and Action sections, you will notice that this dialog is composed of a condition and two actions from these sections.
 - b. In the **At Nth entry** field, enter a numeric value to change the default value. For example, enter 100. When the hundredth entry is sent it triggers the interaction’s actions, which in this case sends a message and awards points to the individual who sent the hundredth entry.
 - c. In the **Send Simple Message** field, enter a message to change the default message. This is the message that will be sent to the individual who sends the hundredth entry.
 - d. In the **Award with points** field, enter a numeric value to change the default number of points. Make sure the number of points in the message matches the number of points in this field.
 - e. Because the Welcome Dialog with Points pre-defined dialog does not contain an At Any Entry or At Any Participation condition, you need to add one or the other condition. Select the next Add New Condition or Dialog section, and then click the At Any Entry’s **Add** button. To add an action to

the dialog, click the Send Simple Message **Add** button. In the **Send Simple Message** field, enter a message to change the default message.

- f. At this point you can do one of the following:
 - Delete one or more of the dialog parts and replace it with a different condition or action, as long as the final storyboard includes the required conditions. (To delete a dialog part, click on its delete button (✖).)
 - Add another pre-defined dialog or build another dialog from a condition and action. (To add a new dialog, in the middle panel underneath the first dialog, click in the Add New Condition or Dialog section, and then select the new dialog or condition and action **Add** buttons.)

Note: If you made errors the Errors and Warnings section highlights your errors. You must fix any errors before you can save the template.

- g. Click **Save**.

- **Example 2**—Creating a dialog by adding a condition and actions:

- a. In the Conditions section, click the **Add** button for one of the condition options. (See “Table 3 - Text 2 Win Interaction Template Condition Options,” on page 85, for the possible options.) In this example, select the At Nth Entry **Add** button.

The middle panel populates with the condition. To the right, the Preview Interactions section describes the condition.

- b. In the **At Nth entry** field, enter a numeric value. For example, enter 100. When the hundredth entry is sent it triggers the interaction’s action, which is directed at the individual who sent the hundredth entry.
- c. In the Actions section, click the **Add** button for one of the action options. (See “Table 4 - Text 2 Win Interaction Template Action Options,” on page 87, for the possible options.) In this example, select the Send Simple Message **Add** button.

The middle panel populates with the action. To the right, the Preview Interactions section describes the action.

- d. In the **Send simple message** field, enter a message. For example, you can notify the participant he or she is being awarded points.
- e. In the Actions section, click the Award With Points **Add** button.

The middle panel populates with the action. To the right, the Preview Interactions section describes the action.

- f. In the **Award with points** field, enter the number of points to award the participant. For example, enter 100.
- g. Because each storyboard must contain either the At Any Entry or At Any Participation condition, you need to add one or the other condition. Select the next Add New Condition or Dialog section, and then click the At Any Entry’s **Add** button. To add an action to the dialog, click the Send Simple Message **Add** button. In the **Send Simple Message** field, enter a message to change the default message.

- h. At this point you can do one of the following:
- Delete one or more of the dialog parts and replace it with a different condition or action, as long as the final storyboard includes the required conditions. (To delete a dialog part, click on its delete button (✕).)
 - Add another dialog or build another dialog from a condition and action. (To add a new dialog, in the middle panel underneath the first dialog, click in the Add New Condition or Dialog section, and then select the new dialog or condition and action Add button.)
- Note:** If you made errors the Errors and Warnings section highlights your errors. You must fix any errors before you can save the template.
- i. Click **Save**.

About Text 2 Win Interaction Storyboard Options

Use an interaction template to define the dialog between a campaign interaction (an activity) and an individual who chooses to opt-in. You can add as many conditions, actions, or dialogs that make sense for your campaign's interaction. You can choose to use a pre-defined dialog or create your own dialog by combining a condition and an action. Each user-defined dialog must have at least one condition and one action.

A condition determines when an action occurs. For example, when to send a message or award points to a participant.

Conditions have a set priority order within their condition group. There are three condition groups; Entries, Participants Group, and Participations. The priority order is the same for all the condition groups. The priority order is At Nth, Every N, and At Any. For example, if you included all three Entries conditions in the storyboard, At Nth will execute first. If it cannot execute, then Every N, second in priority, will execute instead. However, if both At Nth and Every N conditions can execute, only the higher priority, At Nth, will execute. Finally, if both At Nth and Every N cannot execute, then At Any, third in priority, will execute.

IMPORTANT: Each storyboard must have a dialog with either an At Any Entry or an At Any Participation condition. This guarantees that every individual that interacts with the interaction will trigger a response.

Conditions from different condition groups execute in parallel. For example, both At Every N Entry and Every N New Participation can execute at the same time as well At Every N Entry and At Nth New Participation.

Table 3 - Text 2 Win Interaction Template Condition Options

Condition	Definition
Entries	These conditions count entries per individual. Individuals can send multiple entries and each entry is included when calculating the Entries conditions.

Condition	Definition
At Any Entry	Use this condition to trigger the action or dialog for each and every entry of an individual. An individual that sends more than one entry is targeted each time the individual sends an entry.
Every N Entries	Use this condition to trigger the action or dialog each time the set number of entries occurs per individual. For example, set Every N Entries to twenty. When an individual sends the twentieth entry, it triggers an action or dialog targeted at the individual. The action or dialog is triggered again for the individual's fortieth entry, and so on.
At Nth Entry	Use this condition to trigger the action or dialog when the specified entry amount occurs per individual. For example, set At Nth Entry to one hundred. When an individual sends the individual's one hundredth entry, it triggers an action or dialog targeted at the individual.
Participants Group	These conditions count new participants for the interaction.
At Any New Participant	Use this condition to trigger an action or dialog for each and every new participant (unique individuals) for the interaction. The action or dialog is triggered on the participant's first entry. An individual that sends more than one entry is targeted only once (at the time of the first entry).
Every N New Participants	Use this condition to trigger an action or dialog each time a new participant of the specified order sends an entry to the interaction. For example, set Every N New Participants to four. When the fourth new participant (unique individual) sends an entry (their first entry) it triggers the action or dialog. The action or dialog is triggered again for the eighth new participant, and so on. In other words, there might be twenty entries, but only four new participants, with some participants sending multiple entries. The fourth unique individual to participate is considered the fourth new participant.
At Nth New Participant	Use this condition to trigger an action or dialog when a new participant is the Nth new participant for the interaction. For example, set At Nth New Participant to ten. When the tenth new participant (unique individual) sends an entry (their first entry) it triggers the action or dialog. In other words, there might be twenty entries, but only ten new participants, with some participants sending multiple entries. The tenth unique individual to participate is considered the tenth new participant. There can be only one Nth new participant.
Participations	These conditions count entries (or participations) per interaction.

Condition	Definition
At Any Participation	Use this condition to trigger an action or dialog each and every time an individual (participant) participates (sends an entry) in the interaction.
At Nth Participation	Use this condition to trigger an action or dialog when the entry (or participation) is the Nth entry for the interaction. For example, set At Nth Participation to six. When the sixth entry occurs, it triggers the action or dialog, which is targeted at the individual who sent the sixth entry. There can be only one Nth participation.
Every N Participation	Use this condition to trigger an action or dialog <i>each</i> time the specified number of entries occur for the interaction. For example, set Every Nth Participation to five. When the fifth entry occurs, it triggers the action or dialog, which is targeted at the individual who sent the fifth entry. The action or dialog is triggered again when the tenth entry occurs, and so on.

An action is the response by mGage™ when a specific condition is met. (An entry is defined as each time an individual engages with an interaction, for example, sends an SMS or clicks a banner.) For example, in response to an entry, you can send a message or send a message and award points to the participant. (A participant is a unique individual who sends one or more entries. Once an individual sends an entry, they become a participant.)

Table 4 - Text 2 Win Interaction Template Action Options

Action	Definition
Award With Points	Use this action to award points to the participant that is defined by the condition.
Send Simple Message	Use this action to send a message to the participant that is defined by the condition.
Send Pool Message	Use this action to set up a pool of messages that can be sent to the participant that is defined by the condition. The participant is sent one message, which is randomly selected from the message pool.

A dialog is a combination of a condition and one or more actions. There are several pre-defined dialogs, which you can customize.

Table 5 - Text 2 Win Interaction Template Dialog Options

Dialog	Definition
Random Response Dialog	Use this dialog to send a message to the participant for each entry. The participant is sent one message for each entry, which is randomly selected from the message pool.

Dialog	Definition
Random Response Dialog with Points	Use this dialog to send a message to the participant for each entry, and to award the participant points. The participant is sent one message for each entry, which is randomly selected from the message pool.
Welcome Dialog	Use this dialog to send a message to the participant the first time they send an entry.
Welcome Dialog with Points Awards	Use this dialog to send a message to the participant the first time they send an entry, and to award the participant points.

5.2.3 Creating a Vote And Poll Template

This section describes how to create a Vote And Poll interaction template (add the general information and configure the storyboard). Also included are explanations for each of the storyboard conditions and actions. You can use the Vote and Poll interaction template to create voting and quiz interactions.

- “Adding the Vote And Poll Template,” on page 88.
- “Configuring the Vote And Poll Template Storyboard,” on page 91.
- “About Vote And Poll Interaction Storyboard Options,” on page 93.

Adding the Vote And Poll Template General Information

Create the interaction template and enter the template’s general information.

To create a Vote And Poll template:

1. On the mGage™ MS navigation bar, click **Toolkit**.
The Toolkit page appears.
2. In the left navigation and action panel, click **Vote And Poll**.
The Create New Vote And Poll template page appears.
3. Enter the interaction template name and description.
 - a. In the **Name** field, enter the interaction template name.
 - b. In the **Description** field, enter a description for this interaction template.
4. In the Brands section, select a brand in the Available list and move it to the Selected list using the right arrow button (). You can select one or more brands. To remove a brand from the Selected list use the left arrow button ().
Note: Selecting a brand here determines which brands you can publish this interaction template to. Only users that have access to these brands can use this interaction template.
5. In the Channels section, select the type of channel you want this interaction template to run on. You can select one of more channels. The options are:
 - SMS
 - WAP (in future release)

- WEB (in future release)
 - Email (in future release)
6. From the **Type** drop-down menu, select which type of Vote And Poll interaction to set up. The options are:
- **Vote**—Set up an interaction template to ask individuals to send an answer to a question. For example, “What color should the next iFob be?” There are no correct answers; however, you can define possible answers and specify an action in response to each possible answer. You can also define the response action for an invalid answer.
 - **Quiz**—Set up an interaction template to ask individuals to send an answer to a quiz question. For example, “What color is an orange?” There is only one correct answer and you can set up an action in response to the correct answer. The first answer in the list of answers is the correct answer. You can also define possible answers individuals might send and specify an action in response to each possible answer. In addition you can also define an invalid answer and response action.
7. From the **Answering procedure** drop-down menu, select how the answers sent by the participant will be matched to the answers (keywords or aliases) used in the interaction. The options are:

- **Exact Match**—Keywords and their aliases are used as parameters to *exactly match* the answer sent by the participant. The participant needs to send at least one keyword or alias, exactly matching, for it to be a valid response. If the participant sends two (exactly matching) keywords or aliases from two different answer options, the response is invalid.

For example, for the question “Who is your favorite singer?” with the exact matching answers (keywords or aliases) “LUCIANO” and “PAVAROTTI” for the first option and “PLACIDO” and “DOMINGO” for the second option, then if a participant sends just “LUCIANO” or “PAVAROTTI” or “PLACIDO” or “DOMINGO” the response is valid. If the player sends “L PAVAROTTI” (not exact match) or “PAVAROTTI DOMINGO” (includes both options) then the response is invalid.

Use Exact Match when you want to use a symbol to represent a vote or quiz answer option.

For example, for the question “Who is your favorite singer?” with the exact matching answers (keywords or aliases) “LUCIANO” and “PAVAROTTI” and the user adds “1” or “A” in the keyword alias field, then if a participant sends just “1” or “A” the response is valid.

- **Include Match**— Keywords and their aliases are used as parameters to match with *part* of the answer sent by the participant. The participant needs to send a response that contains at least one keyword or alias that matches the interaction’s keyword or alias for it to be a valid response. If the participant sends two (exactly matching) keywords or aliases from two different voting or quiz answer options, the response is invalid.

For example, for the question “Who is your favorite singer?” with the included matching answers (keywords or aliases) “LUCIANO”, “PAVAROTTI”, and “ITALIAN” for the first option and “PLACIDO”, “DOMINGO”, and “SPANISH” for

the second option, then if a participant sends “LUCIANO TENOR” or “PLACIDO SPANISH” the response is valid. If the player sends “LPAVAROTTI” (matches on single words) or “PAVAROTTI DOMINGO” (includes both options) then the response is invalid.

- **I.V.R.S.** (Intelligent Vote Recognition System)—Keywords and their aliases are used as parameters to match with *part* of the answer sent by the participant (matches parts of a single word). The participant needs to send a response that contains at least one keyword or alias that matches the interaction’s keyword or alias for it to be a valid response. If the participant sends two (exactly matching) keywords or aliases from two different voting or quiz answer options, the response is invalid.

For example, for the question “Who is your favorite singer?” with the included matching answers (keywords or aliases) “LUCIANO”, “PAVAROTTI”, and “ITALIAN” for the first option and “PLACIDO”, “DOMINGO”, and “SPANISH” for the second option, then if a participant sends “LUCIANOTENOR” or “PLACIDO IS SPANISH” the response is valid. If the player sends “PAVAROTTI DOMINGO” (includes both options) then the response is invalid.

8. If you want to give a participant, who sends an invalid entry, another chance to send an entry, then select the **Participant must be blocked...** checkbox. The participant is blocked from further participation with the interaction until the participant sends a valid entry. The participant receives a message stating their entry was invalid and that they can try again.

If this checkbox is not selected, then the participant receives a message stating their entry was invalid and that they do not get another chance to enter.

Note: You must enter, in the storyboard, the message to send to the participant with the invalid entry. You can do this by adding a Send Simple Message or Send Pool Message action to the At INVALID answer of question condition in the storyboard. Make sure you indicate in the message whether or not the participant can send another entry.

9. Choose a session and keyword requirement option:
 - If you select the **Open a session...** checkbox, mGage™ enables an interaction response (or session) time limit. This time limit determines how long (from the time the individual received the last message) the individual has to send a response to the interaction. After the time limit expires, mGage™ sends a general error message to the participant, if the participant sends a response. When a user creates a campaign interaction from the My Campaigns tab, using this interaction template, the user is asked to enter, in minutes, the Session Duration time for that interaction. The maximum session duration time that the user can set is 10 minutes.

In addition, mGage™ does not require a keyword in the response.

For example, if the question is “Who is the U.S. President?” and there are two answers: “A. Bush” or “B. Obama,” then the individual can send ‘A’ for Bush (instead of the keyword+A) or ‘B’ for Obama (instead of the keyword+B).

- If you do not select the **Open a session...** checkbox, there is no interaction response (or session) time limit.

In addition, mGage™ requires a keyword in the response.

For example, if the question is “Who is the U.S. President?” and there are two answers: “A. Bush” or “B. Obama,” then the individual must send ‘Keyword A’ for Bush or ‘Keyword B’ for Obama.

10. In the **Question** field, enter a question to ask the quiz or voting participant.
11. In the Available Answers field, select how many answers there are for this quiz or voting poll. The minimum and default number is two answers, and the maximum is four answers. (In addition to these user-defined answers, you can configure an invalid answer on the story board.)
12. Click **Create Storyboard**.
The Toolkit page appears and the new interaction template appears in the Storyboard Templates list. In the General Info section, you can view and edit the information that you just entered for the interaction template.
13. To edit the storyboard, select the interaction template and click **Edit Storyboard**.
The Storyboard Dialog Configuration page appears.
14. To configure the interaction template’s Storyboard, see “Configuring the Vote And Poll Template Storyboard,” on page 91.

Configuring the Vote And Poll Template Storyboard

After you create the general information for the interaction template, you configure the storyboard.

NOTE: Each time an individual engages with an interaction, whether it is via sending an SMS message or by clicking on a banner, the individual is granted an entry. To simplify how to refer to the numerous possible methods of engaging with an interaction, when creating templates, this User Guide will refer to all methods as “sends an entry” although the individual is actually granted an entry.

To configure the Vote And Poll template storyboard:

1. On the mGage™ MS navigation bar, click **Toolkit**.
The Toolkit page appears.
2. Select the interaction template to configure and click **Edit Storyboard**.

The Storyboard Dialog Configuration page appears.

The Vote And Poll template storyboard automatically generates the interaction conditions based on the number of answers you selected this interaction to have. It will always start with a condition for an invalid answer, and then a condition for each of the additional, valid answers. You must add at least one action for each condition; however, you can add as many actions to each of the conditions as makes sense for your campaign’s interaction.

A condition determines when an action occurs. For example, when to send a message or award points to a participant. An action is the response to an entry. For example, you can send a message or send a message and award points to the participant.

As the Vote And Poll template storyboard can be configured in many different ways, the remainder of this section shows one such example, and presumes the interaction template includes the minimum, two answers.

3. Select the first dialog section, which defines the condition for the invalid answer, and then in the Actions section, click the **Add** button for one of the action options. (See “Table 6 - Vote And Poll Interaction Template Action Options,” on page 93, for the possible options.) In this example, select the Send Simple Message **Add** button.

The middle panel populates with the action. To the right, the Preview Interactions section describes the action.

4. In the **Send simple message** field, enter a message. For example, you can notify the participant that he or she sent the wrong answer.
5. Select the second dialog section, which defines the first correct answer, and then in the Actions section, click the **Add** button for one of the action options. (See “Table 6 - Vote And Poll Interaction Template Action Options,” on page 93, for the possible options.) In this example, select the Award with points **Add** button.

The middle panel populates with the action. To the right, the Preview Interactions section describes the action.

6. In the **Award with points** field, enter the number of points to award the participant. For example, enter 100.
7. You can select another action for this dialog. In this example, select the Send Simple Message **Add** button.
8. In the **Send simple message** field, enter a message. For example, you can notify the participant that he or she sent the correct answer and has just been awarded 100 points.
9. Select the third dialog section, which defines the second correct answer, and then in the Actions section, click the **Add** button for one of the action options. (See “Table 6 - Vote And Poll Interaction Template Action Options,” on page 93, for the possible options.) In this example, select the Award with points **Add** button.
10. In the **Award with points** field, enter the number of points to award the participant. For example, enter 50.
11. You can select another action for this dialog. In this example, select the Send Simple Message **Add** button.
12. In the **Send simple message** field, enter a message. For example, you can notify the participant that he or she sent the correct answer and has just been awarded 50 points.
13. At this point you can do one of the following:
 - Edit an existing action’s fields.
 - Delete one or more of the actions in the dialogs. (To delete an action, click on its delete button (✕).)
 - Add another action to one of more of the dialogs.

Note: If you made errors the Errors and Warnings section highlights your errors. You must fix any errors before you can save the template.

14. Click Save.

About Vote And Poll Interaction Storyboard Options

Use an interaction template to define the dialog between a campaign interaction (an activity) and an individual who chooses to opt-in. You can add as many actions that make sense for your campaign's interaction.

A condition determines when an action occurs. For example, when to send a message or award points to a participant. Each condition requires at least one action.

An action is the response to an entry. (An entry is defined as each time an individual sends an entry.) For example, in response to an entry, you can send a message or send a message and award points to the participant. (A participant is a unique individual who sends one or more entries. Once an individual sends an entry, they become a participant.)

Table 6 - Vote And Poll Interaction Template Action Options

Action	Definition
Award With Points	Use this action to award points to the participant that is defined by the condition.
Send Simple Message	Use this action to send a message to the participant that is defined by the condition.
Send Pool Message	Use this action to set up a pool of messages that can be sent to the participant that is defined by the condition. The participant is sent one message, which is randomly selected from the message pool.

5.2.4 Creating an On Pack Template

This section describes how to create an On Pack interaction template (add general information and configure the storyboard). Also included are explanations for each of the storyboard conditions and actions.

- “Adding the On Pack Template,” on page 93.
- “Configuring the On Pack Template Storyboard,” on page 94.
- “About On Pack Interaction Storyboard Options,” on page 98.

Adding the On Pack Template General Information

Create the interaction template and enter the template's general information.

To create an On Pack template:

1. On the mGage™ MS navigation bar, click **Toolkit**.
The Toolkit page appears.
2. In the left navigation and action panel, click **On Pack**.
The Create On Pack Template page appears.
3. Enter the interaction template name and description.

- a. In the **Name** field, enter the interaction template name.
 - b. In the **Description** field, enter a description for this interaction template.
4. In the Brands and Toolkit section, select a brand in the Available list and move it to the Selected list using the right arrow button (). You can select one or more brands. To remove a brand from the Selected list use the left arrow button ().

Note: Selecting a brand here determines which brands you can publish this interaction template to. Users that have access to these brands can access this interaction template.

5. In the Channels section, select the type of channel you want this interaction template to run on. You can select one of more channels. The options are:
 - SMS
 - WAP (in future release)
 - WEB (in future release)
 - Email (in future release)
6. Select how many coupon categories you want to associate with this interaction template. (When a user uses this interaction template to create an interaction, at that point, the user will associate which coupon categories to use with the interaction.) In the Categories section, click the coupon category add button (). A new coupon category appears in the categories list. Use the coupon category delete button () to remove a coupon category.
7. For each coupon category you add, select a coupon redemption type. The options are:
 - **Unique**—Each coupon in the coupon category can be redeemed only once.
 - **Unique per user**—Each coupon in the coupon category can be redeemed only once per participant.
 - **Not unique**—Each coupon in the coupon category can be redeemed multiple times by multiple participants.

8. Click **Create Storyboard**.

The Toolkit home page appears and the new interaction template appears in the Storyboard Templates list. In the General Info section, you can view and edit the information that you just entered for the interaction template.

9. To edit the storyboard, select the interaction template and click **Edit Storyboard**.
10. The Storyboard Dialog Configuration page appears.

To configure the interaction template's Storyboard, see "Configuring the On Pack Template Storyboard," on page 94.

Configuring the On Pack Template Storyboard

After you create the general information for the interaction template, you configure the storyboard.

To configure the On Pack template storyboard:

1. On the mGage™ MS navigation bar, click **Toolkit**.

The Toolkit page appears.

2. Select the interaction template to configure and click **Edit Storyboard**.

The Storyboard Dialog Configuration page appears.

3. You can add as many conditions, actions, or dialogs that makes sense for your campaign's interaction.

IMPORTANT: Each On Pack storyboard must have at least three dialogs with the following three conditions (and associated actions) set to Any; At Any Coupon Of Category, At Not Redeemable Coupon Of Category, and At Incorrect Coupon Of Category.

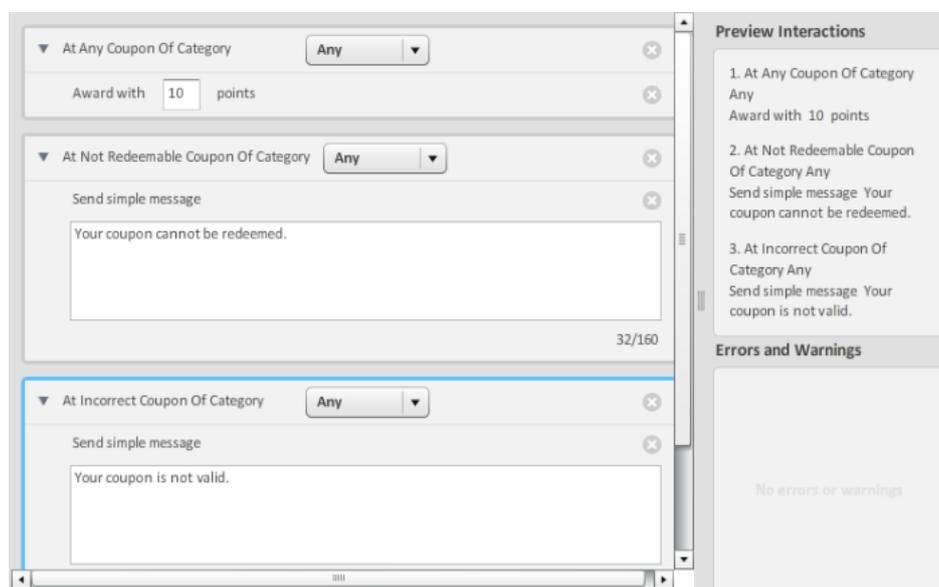


Figure 36 - On Pack Storyboard Required Conditions - Any

If the Any option is not set, then the same three conditions must be set for each coupon Category that is included in the interaction template. For example, an On Pack storyboard has Category 1 and Category 2. Therefore the storyboard must have at least six dialogs; At Any Coupon Of Category set to Category 1, At Any Coupon Of Category set to Category 2, At Not Redeemable Coupon Of Category set to Category 1, At Not Redeemable Coupon Of Category set to Category 2, At Incorrect Coupon Of Category set to Category 1, and At Incorrect Coupon Of Category set to Category 2.

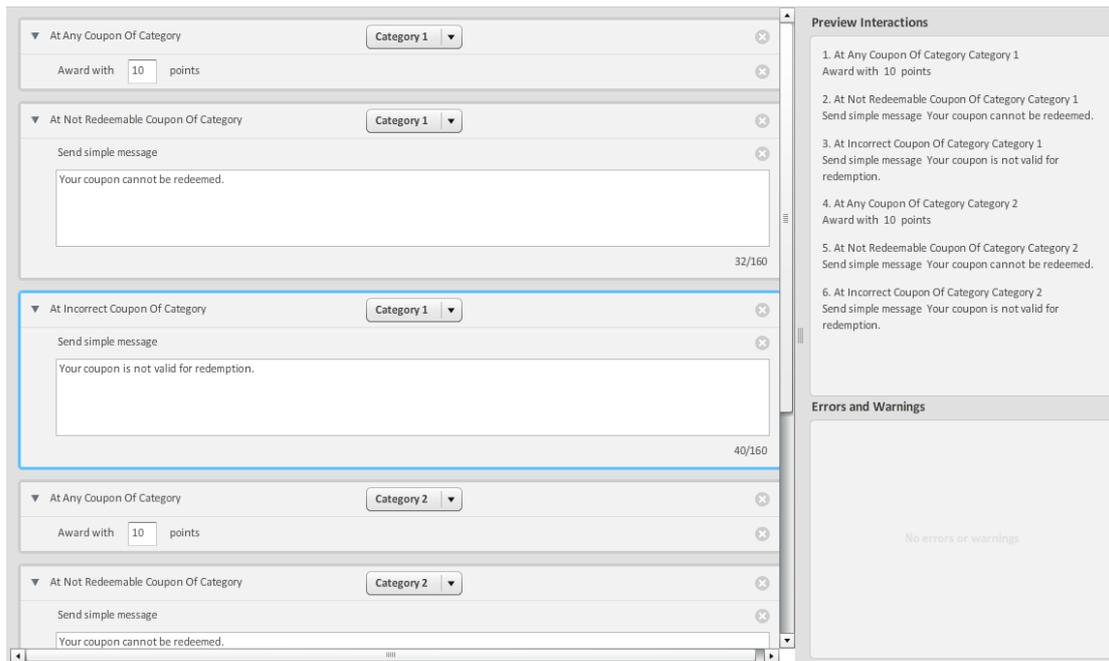


Figure 37 - On Pack Storyboard Required Conditions - By Category

A condition determines when an action occurs. For example, when to send a message or award points to a participant. An action is the response to an entry. For example, you can send a message or send a message and award points to the participant. A dialog is a combination of a condition and an action. There are several pre-defined dialogs, see “Table 9 - On Pack Interaction Template Dialog Options” on page 100, which you can customize. You can choose to use a pre-defined dialog or create your own dialog by combining a condition and an action. Each user-defined dialog must have at least one condition and one action.

- See “Table 7 - On Pack Interaction Template Condition Options,” on page 98, for a list of possible condition options.
- See “Table 8 - On Pack Interaction Template Action Options,” on page 100, for a list of possible action options.
- See “Table 9 - On Pack Interaction Template Dialog Options,” on page 100, for a list of possible dialog options.

As the On Pack template storyboard can be configured in many different ways, the remainder of this section shows one example.

Example 1—Adding a pre-defined dialog and two user-defined dialogs:

1. Add dialog with first required condition (At Any Coupon of Category):
 - a. In the Dialogs section, click the **Add** button for one of the pre-defined dialog options. (See “Table 9 - On Pack Interaction Template Dialog Options” on page 100, for the possible options.) In this example, select the Random Response Dialog **Add** button.

The middle panel populates with the pre-defined dialog and its default settings. To the right, the Preview Interactions section describes the dialog. The dialog has three parts; one condition (At Any Coupon of Category set to Any) and an action (Send pool message). If you look at the Conditions and

Action sections, you will notice that this dialog is composed of a condition and an action from these sections.

- b. In the **At Any Coupon of Category** field, keep the Any default value. When an individual sends a coupon it triggers the interaction's action, which in this case sends one of the pool messages to the individual who sent the coupon.
 - c. In the **Send Pool Message** field, you can keep the default messages, edit the default messages, add another pool message, or delete a default pool message. When the associated condition is met, the interaction responds by randomly selecting a pool message and sending it to the individual who sent the coupon.
 - To edit a pool message, select the message and click **Edit**. Change the message content, and then click **Save**.
 - To add a new pool message, click the add button (). Add message content, and then click **Save**.
 - To delete a pool message, select the message and click the delete button (.
2. Add dialog with second required condition (At Not Redeemable Coupon Of):
- a. Select the next Add New Condition or Dialog section.
 - b. In the Conditions section, click the **Add** button for the At Not Redeemable Coupon Of condition.

The middle panel populates with the condition. To the right, the Preview Interactions section describes the condition. Keep the Any default option.
 - c. In the Actions section, click the **Add** button for the Send Simple Message action option.

The middle panel populates with the action. To the right, the Preview Interactions section describes the action.
 - d. In the **Send simple message** field, enter a message. For example, you can notify the individual he or she sent a coupon that cannot be redeemed.
3. Add dialog with third required condition (At Incorrect Coupon Of):
- a. Select the next Add New Condition or Dialog section.
 - b. In the Conditions section, click the **Add** button for the At Incorrect Coupon Of condition.

The middle panel populates with the condition. To the right, the Preview Interactions section describes the condition. Keep the Any default option.
 - c. In the Actions section, click the **Add** button for the Send Simple Message action option.

The middle panel populates with the action. To the right, the Preview Interactions section describes the action.
 - d. In the **Send simple message** field, enter a message. For example, you can notify the individual he or she sent a coupon that is not valid.

4. At this point you have added one condition for each of the required conditions, and they are all set to Any. You can now do one of the following:
 - Delete one or more of the dialog parts and replace it with a different condition or action, as long as the final storyboard includes the required conditions. (To delete a dialog part, click on its delete button (✕).)
 - Add another dialog or build another dialog from a condition and action. (To add a new dialog, in the middle panel underneath the first dialog, click in the Add New Condition or Dialog section, and then select the new dialog or condition and action Add button.)
5. Click Save.

About On Pack Interaction Storyboard Options

Use an interaction template to define the dialog between a campaign interaction (an activity) and an individual who chooses to opt-in. You can add as many conditions and actions, or dialogs that make sense for your campaign's interaction. You can choose to use a pre-defined dialog or create your own dialog by combining a condition and an action. Each user-defined dialog must have at least one condition and one action.

A condition determines when an action occurs. For example, when to send a message or award points to a participant. Each condition requires at least one action.

IMPORTANT: Each On Pack storyboard must have at least three dialogs with the following three conditions (and associated actions) set to Any; At Any Coupon Of Category, At Not Redeemable Coupon Of Category, and At Incorrect Coupon Of Category. If the Any option is not set, then the same three conditions must be set for each coupon Category that is included in the interaction template. For example, an On Pack storyboard has Category 1 and Category 2. Therefore the storyboard must have at least six dialogs; At Any Coupon Of Category set to Category 1, At Any Coupon Of Category set to Category 2, At Not Redeemable Coupon Of Category set to Category 1, At Not Redeemable Coupon Of Category set to Category 2, At Incorrect Coupon Of Category set to Category 1, and At Incorrect Coupon Of Category set to Category 2.

Table 7 - On Pack Interaction Template Condition Options

Condition	Definition
Categories	These conditions apply to all coupon redemptions for all coupon categories, unless the coupon category is defined. Participants can send multiple coupons and each coupon redemption is included when calculating the Categories conditions. The coupon redemption count is per individual.
Every N Coupons	Use this condition to trigger an action each time the individual redeems the specified number of coupons. For example, set Every N Coupons to twenty. When the individual redeems the twentieth coupon it triggers an action targeted at the individual. The action is triggered again for the fortieth coupon redemption, and so on.

Condition	Definition
At Incorrect Coupon of Category	Use this condition to trigger an action when an individual tries to redeem a coupon, but due to an error the individual sends the wrong coupon code. For example, set At Incorrect Coupon of Category to Category 1. An individual tries to redeem a coupon for Category 1 by sending an erroneous coupon code. The erroneous code triggers an action targeted at the individual who tried to redeem the coupon. For example, set At Incorrect Coupon of Category to Any. An individual tries to redeem a coupon for Category 1 (or any other category) by sending an erroneous coupon code. The erroneous code triggers an action targeted at the individual who tried to redeem the coupon. In both cases, the coupon itself is valid, but the individual made an error when redeeming the coupon. For example, the correct coupon code is 'ABC123', but the individual sent 'ABD123' by mistake.
At Nth Coupon	Use this condition to trigger an action when the specified number of coupons is redeemed. For example, set At Nth Coupon to ten. When the individual redeems the tenth coupon it triggers an action targeted at the individual.
At Not Redeemable Coupon of Category	Use this condition to trigger an action each time an individual tries to redeem a coupon that is not redeemable according to the specified category or all categories redemption policy. For example, set At Not Redeemable Coupon of Category to Category 1. When an individual tries to redeem a coupon that is not redeemable for Category 1, then it triggers an action targeted at the individual who tried to redeem the coupon. For example, set At Not Redeemable Coupon of Category to Any. When an individual tries to redeem a coupon that is not redeemable for Category 1 (or any other category), then it triggers an action targeted at the individual who tried to redeem the coupon. In both cases, the coupon code was sent correctly, but the coupon itself is not redeemable, for example, the redemption policy is UNIQUE_PER_USER and the coupon was already redeemed on a different occasion.
At Any Coupon of Category	Use this condition to trigger an action each time an individual redeems a coupon for the specified category. For example, set At Any Coupon of Category to Category 1. Each time an individual redeems a coupon for Category 1 it triggers an action targeted at that individual. For example, set At Any Coupon of Category to Any. Each time an individual redeems a coupon for Category 1 (or any category) it triggers an action targeted at that individual.

An action is the response to an individual redeeming a coupon. For example, in response to an individual redeeming a coupon, you can send a message or send a message and award points to the individual.

Table 8 - On Pack Interaction Template Action Options

Action	Definition
Award With Points	Use this action to award points to the individual that is defined by the condition.
Send Pool Message	Use this action to set up a pool of messages that can be sent to the individual that is defined by the condition. The individual is sent one message, which is randomly selected from the message pool.
Send Simple Message	Use this action to send a message to the individual that is defined by the condition.

A dialog is a combination of a condition and one or more actions. There are several pre-defined dialogs, which you can customize.

Table 9 - On Pack Interaction Template Dialog Options

Dialog	Definition
Random Response Dialog	Use this dialog to send a message to the individual each time he/she redeems a coupon. The individual is sent one message per coupon redemption, which is randomly selected from the message pool.
Welcome Dialog with Points	Use this dialog to send a message to the individual the first time he/she redeems a coupon, and to award the individual with points.
Random Response Dialog with Points	Use this dialog to send a message to the individual each time he/she redeems a coupon, and to award the individual with points. The individual is sent one message per coupon redemption, which is randomly selected from the message pool.
Welcome Dialog	Use this dialog to send a message to the individual the first time he/she redeems a coupon.
Not Redeemable Coupon Dialog	Use this dialog to send a message to the individual that the coupon he/she sent cannot be redeemed.
Incorrect Coupon Dialog	Use this dialog to send a message to the individual that the coupon he/she sent is invalid for this interaction.

5.2.5 Creating a Send Coupon Template

This section describes how to create a Send Coupon interaction template (add general information and configure the storyboard). Also included are explanations for each of the storyboard conditions and actions.

- “Adding the Send Coupon Template,” on page 101.
- “Configuring the Send Coupon Interaction Storyboard,” on page 101.
- “About Send Coupon Interaction Storyboard Options,” on page 104.

Adding the Send Coupon Template General Information

Create the interaction template and enter the template’s general information.

To create a Send Coupon template:

1. On the mGage™ MS navigation bar, click **Toolkit**.
The Toolkit page appears.
2. In the left panel, click **Send Coupon**.
The Create New Coupon Template page appears.
3. Enter the interaction template name and description.
 - c. In the **Name** field, enter the interaction template name.
 - d. In the **Description** field, enter a description for this interaction template.
4. In the Brands section, select a brand in the Available list and move it to the Selected list using the right arrow button (). You can select one or more brands. To remove a brand from the Selected list use the left arrow button ().
Note: Selecting a brand here determines which brands you can publish this interaction template to. Users that have access to these brands can access this interaction template.
5. In the Channels section, select the type of channel you want this interaction template to run on. You can select one of more channels. The options are:
 - SMS
 - WAP
 - WEB
 - Email
6. Click **Create Story Board**.
The Toolkit page appears and the new interaction template appears in the Storyboard Templates list. In the General Info section, you can view or edit the information that you just entered for the interaction template.
7. To edit the storyboard, select the interaction template and click **Edit Storyboard**.
The Storyboard Dialog Configuration page appears.
8. To configure the interaction template’s Storyboard, see “Configuring the Send Coupon Interaction Storyboard,” on page 101.

Configuring the Send Coupon Interaction Storyboard

After you create the general information for the interaction template, you configure the storyboard.

NOTE: Each time an individual engages with an interaction, whether it is via sending an SMS message or by clicking on a banner, the individual is granted an entry. To simplify how to refer to the numerous possible methods of engaging with an interaction, when creating templates, this User Guide will refer to all methods as “sends an entry” although the individual is actually granted an entry.

To configure the Send Coupon template storyboard:

1. On the mGage™ MS navigation bar, click **Toolkit**.

The Toolkit page appears.

2. Select the interaction template to configure and click **Edit Storyboard**.

The Storyboard Dialog Configuration page appears.

3. You can add as many conditions, actions, or dialogs that make sense for your campaign’s interaction.

IMPORTANT: Each storyboard must have a dialog with either an At Any Entry or an At Any Participation condition (and a corresponding action). This guarantees that every individual that interacts with the interaction will trigger an action.

A condition determines when an action occurs. For example, when to send a message or award points to a participant. An action is the response to an entry. For example, you can send a message or send a message and award points to the participant. A dialog is a combination of a condition and action. You can choose to use a pre-defined dialog or create your own dialog by combining a condition and an action. Each user-defined dialog must have at least one condition and one action.

- See “Table 10 - Send Coupon Interaction Template Condition Options,” on page 105, for a list of possible condition options.
- See “Table 11 - Send Coupon Interaction Template Action Options,” on page 106, for a list of possible action options.
- See “Table 12 - Send Coupon Interaction Template Dialog Options,” on page 107, for a list of possible dialog options.

As the Send Coupon template storyboard can be configured in many different ways, the remainder of this section shows some examples.

- **Example 1**—Adding a pre-defined dialog:
 - a. In the Dialogs section, click the add button for one of the dialog options. (See “Table 12 - Send Coupon Interaction Template Dialog Options” on page 107, for the possible options.) In this example, select the Welcome Dialog **Add** button.

The middle panel populates with the pre-defined dialog and its default settings. To the right, the Preview Interactions section describes the dialog. The dialog has three parts; one condition (At Nth Entry) and two actions (Send simple message and Send coupon of Category). (If you look at the Conditions and Action sections, you will notice that this dialog is composed of a condition and two actions from these sections.)

- b. In the **At Nth entry** field, enter a numeric value to change the default value. For example, enter 10. When the tenth entry occurs it triggers the

interaction's actions, which in this case sends a simple message and a coupon to the individual who sent the tenth entry.

- c. In the **Send Simple Message** field, enter a message to change the default message. This is the message that will be sent to the individual who sent the tenth entry.
 - d. In the **No coupon message** field, enter a message to send to the individual if there are no more coupons available to send. (The user selects which coupon category to use when they create the interaction using this interaction template.)
 - e. Because the Welcome Dialog pre-defined dialog does not contain an At Any Entry or At Any Participation condition, you need to add one or the other condition. Select the next Add New Condition or Dialog section, and then click the At Any Entry's **Add** button. To add an action to the dialog, click the Send Simple Message **Add** button. In the Send Simple Message field, enter a message to change the default message.
 - f. At this point you can do one of the following:
 - Delete one or more of the dialog parts and replace it with a different condition or action, as long as the final storyboard includes the required conditions. (To delete a dialog part, click on its delete button (✕).)
 - Add another pre-defined dialog or build another dialog from a condition and action. (To add a new dialog, in the middle panel underneath the first dialog, click in the Add New Condition or Dialog section, and then select the new dialog or condition and action **Add** button.)
 - g. Click **Save**.
- **Example 2—Creating a dialog by adding a condition and actions:**
 - a. In the Conditions section, click the **Add** button for one of the condition options. (See “Table 10 - Send Coupon Interaction Template Condition Options,” on page 105, for the possible options.) In this example, select the **At Nth Entry Add** button.

The middle panel populates with the condition. To the right, the Preview Interactions section describes the condition.
 - b. In the **At Nth Entry** field, enter a numeric value. For example, enter 100. When the hundredth entry is received it triggers the interaction's action, which is directed to the individual who sent the hundredth entry.
 - c. In the Actions section, click the Add button for one of the action options. (See “Table 11 - Send Coupon Interaction Template Action Options,” on page 106, for the possible options.) In this example, select the **Send Simple Message Add** button.

The middle panel populates with the action. To the right, the Preview Interactions section describes the action.
 - d. In the **Send simple message** field, enter a message. For example, you can notify the individual he or she is being sent a coupon.
 - e. In the Actions section, click the **Send coupon Add** button.

The middle panel populates with the action. To the right, the Preview Interactions section describes the action. (The user selects which coupon category to use when they create the interaction using this interaction template.)

- f. In the **No coupon message** field, enter a message to send to the individual if there are no more coupons available to send.
- g. Because the Welcome Dialog with Points pre-defined dialog does not contain an At Any Entry or At Any Participation condition, you need to add one or the other condition. Select the next Add New Condition or Dialog section, and then click the At Any Entry's **Add** button. To add an action to the dialog, click the Send Simple Message **Add** button. In the Send Simple Message field, enter a message to change the default message.
- h. At this point you can do one of the following:
 - Edit an existing condition's or action's fields.
 - Delete one or more of the dialog parts and replace it with a different condition or action. (To delete a dialog part, click on its delete button ().)
 - Build another dialog from a condition and an action. (To add a new dialog, in the middle panel underneath the first dialog, click in the Add New Condition or Dialog section, and then select the new condition and action Add buttons.)
- i. Click **Save**.

About Send Coupon Interaction Storyboard Options

Use an interaction template to define the dialog between a campaign interaction (an activity) and an individual who chooses to opt-in. You can add as many conditions, actions, or dialogs that make sense for your campaign's interaction. You can choose to use a pre-defined dialog or create your own dialog by combining a condition and an action. Each user-defined dialog must have at least one condition and one action.

A condition determines when an action occurs. For example, when to send a message, send a coupon, or award points to a participant.

Conditions have a set priority order within their condition group. There are three condition groups; Entries, Participants Group, and Participations. The priority order is the same for all the condition groups. The priority order is At Nth, Every N, and At Any. For example, if you included all three Entries conditions in the storyboard, At Nth will execute first. If it cannot execute, then Every N, second in priority, will execute instead. However, if both At Nth and Every N conditions can execute, only the higher priority, At Nth, will execute. Finally, if both At Nth and Every N cannot execute, then At Any, third in priority, will execute.

IMPORTANT: Each storyboard must have a dialog with either an At Any Entry or an At Any Participation condition. This guarantees that every individual that interacts with the interaction will trigger a response.

Conditions from different condition groups execute in parallel. For example, both At Every N Entry and Every N New Participation can execute at the same time as well At Every N Entry and At Nth New Participation.

Table 10 - Send Coupon Interaction Template Condition Options

Condition	Definition
Entries	These conditions apply to all entries. Individuals can send multiple entries and each entry is included when calculating the Entries conditions.
At Any Entry	Use this condition to trigger the action for each entry. An individual that sends more than one entry is targeted each time they send an entry.
Every N Entries	Use this condition to trigger the action each time the specified number of entries occurs. For example, set Every N Entries to twenty. When the twentieth entry is received it triggers an action targeted at the individual who sent the twentieth entry. The action is triggered again for the fortieth entry, and so on.
At Nth Entry	Use this condition to trigger the action when the specified entry amount occurs. For example, set At Nth Entry to a hundred. When the hundredth entry is received it triggers an action or dialog targeted at the individual who sent the hundredth entry.
Participants Group	These conditions apply to all participants, as a group.
Every N New Participants	Use this condition to trigger an action each time an individual becomes a new participant and they are the new participant of the specified order. For example, set Every N Participants to four. When the fourth new participant (unique individual) sends an entry (keyword) it triggers the action. The action is triggered again for the eighth participant, and so on. In other words, there might be twenty entries, but only four participants, with some participants sending multiple entries. The fourth unique individual to participate is considered the fourth new participant.
At Any New Participant	Use this condition to trigger an action for all new participants (unique individuals). The action or dialog is triggered the first time the individual sends an entry. An individual that sends more than one entry is targeted only once at the time of the first entry.

Condition	Definition
At Nth New Participant	Use this condition to trigger an action for the individual who is the specified new participant by the order of participation. For example, set At Nth Participant to ten. When the tenth new participant (unique individual) sends an entry (their first entry) it triggers the action. In other words, there might be twenty entries, but only ten participants, with some participants sending multiple entries. The tenth unique individual to participate is considered the tenth new participant.
Participations	These conditions apply to each participant, as an individual. The specified numbers are compared to how many times the individual participates (sends an entry).
At Nth Participation	Use this condition to trigger an action when the individual sends the specified number of entries. For example, set At Nth Participation to six. When the individual sends his/her sixth entry it triggers the action.
At Any Participation	Use this condition to trigger an action each time an individual (participant) participates (sends an entry).
Every N Participation	Use this condition to trigger an action <i>each</i> time the individual sends the specified number of entries. For example, set Every Nth Participation to five. When the individual sends an entry for the fifth time it triggers the action. The action is triggered again for the tenth entry, and so on.

An action is the response to an individual sending an entry. (An entry is defined as each time an individual sends an entry.) For example, in response to an individual sending an entry, you can send a message or send a message and a coupon to the participant. (A participant is a unique individual who sends one or more entries. Once an individual sends an entry, they become a participant.)

Table 11 - Send Coupon Interaction Template Action Options

Action	Definition
Send Simple Message	Use this action to send a message to the participant that is defined by the condition.
Send Coupon	Use this action to send a coupon to the participant that is defined by the condition.
Send Pool Message	Use this action to set up a pool of messages that can be sent to the participant that is defined by the condition. The participant is sent one message, which is randomly selected from the message pool.
Award With Points	Use this action to award points to the participant that is defined by the condition.

A dialog is a combination of a condition and one or more actions. There are several pre-defined dialogs, which you can customize.

Table 12 - Send Coupon Interaction Template Dialog Options

Dialog	Definition
Welcome Dialog	Use this dialog to send a message to the individual the first time he/she sends an entry.
Random Response Dialog	Use this dialog to send a message to the individual each time he/she sends an entry. The individual is sent one message per entry, which is randomly selected from the message pool.

5.2.6 Viewing an Interaction Template

You can view all the existing interaction templates on the Toolkit page.

To view an interaction template:

1. On the mGage™ MS navigation bar, click **Toolkit**.

The Toolkit page appears, and in the Storyboard Templates section, displays a list of interaction templates.

2. Select a template.

The General Info and Preview sections refresh and display high-level information about the interaction template.

5.2.7 Editing an Interaction Template

You can edit only the interaction templates that were created with your user account; however, once an interaction template is used to create a campaign's interaction you cannot edit the interaction template. You can edit existing interaction templates from the Toolkit page.

To edit an interaction template:

1. On the mGage™ MS navigation bar, click **Toolkit**.

The Toolkit page appears, and in the Storyboard Templates section, displays a list of interaction templates.

2. Select a template.

The General Info and Preview sections refresh and display high-level information about the interaction template.

3. To edit the interaction template's general information, click **Edit Info**.

The General Info section refreshes, and you can edit the fields.

To save your changes, click **Save**.

4. To edit the interaction template's storyboard interactions, click **Edit Storyboard**.

The Storyboard Dialog Configuration page appears. See the following sections for information on configuring the various interaction storyboards.

- “Configuring the Text 2 Win Template Storyboard,” on page 82.
- “Configuring the Vote And Poll Template Storyboard,” on page 91.
- “Configuring the On Pack Template Storyboard,” on page 94.
- “Configuring the Send Coupon Interaction Storyboard,” on page 101.

To save your changes, click **Save**.

5.2.8 Publishing an Interaction Template

Once you create an interaction template (add the general information and set up the storyboard), the interaction template automatically becomes available to users for creating interactions in their campaigns (provided their user account has access to the associated brand). When the user creates a new campaign interaction by clicking on an Add Interaction add button, the interaction template appears in the Select Interaction Template list.

6 Coupon Manager

You can manage all your campaign's mobile coupon needs using the mGage™ MS Coupon Manager. For example, you can generate a pool of coupons and use them in campaigns that have on-pack interactions. You can determine whether the coupons are multi-use or unique-use. You can reserve, lock, and release coupon categories. Coupons not redeemed are automatically released once the interaction ends. In addition, you can export the pool of coupons.

You can determine the coupon length, type (for example, alphanumeric or numeric only), capacity, and range, and generate coupons for specific brands.

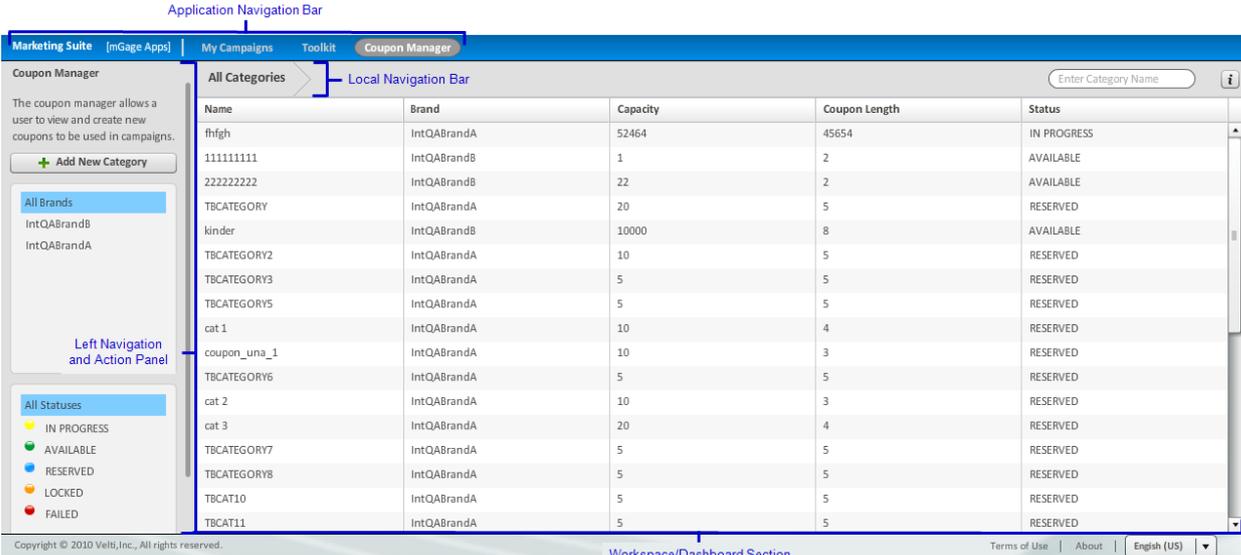
6.1 Coupon Manager Interface

This section describes the Coupon Manager interface in detail. See “Using the Coupon Manager Interface,” on page 111 for the various tasks you can perform using the Coupon Manager interface.

To access the Coupon Manager functions:

1. From the mGage™ MS application navigation bar, click **Coupon Manager**.

The Coupon Manager page appears.



The screenshot shows the Coupon Manager interface. At the top, there is an 'Application Navigation Bar' with tabs for 'Marketing Suite', 'mGage Apps', 'My Campaigns', 'Toolkit', and 'Coupon Manager'. Below this is a 'Local Navigation Bar' with 'All Categories' selected. The main area contains a table of coupon categories. On the left, there is a 'Left Navigation and Action Panel' with an 'Add New Category' button and sections for 'All Brands' and 'All Statuses'. The footer includes copyright information and a language dropdown set to 'English (US)'.

Name	Brand	Capacity	Coupon Length	Status
fhfgh	IntQABrandA	52464	45654	IN PROGRESS
111111111	IntQABrandB	1	2	AVAILABLE
222222222	IntQABrandB	22	2	AVAILABLE
TBCATEGORY	IntQABrandA	20	5	RESERVED
kindr	IntQABrandB	10000	8	AVAILABLE
TBCATEGORY2	IntQABrandA	10	5	RESERVED
TBCATEGORY3	IntQABrandA	5	5	RESERVED
TBCATEGORY5	IntQABrandA	5	5	RESERVED
cat 1	IntQABrandA	10	4	RESERVED
coupon_una_1	IntQABrandA	10	3	RESERVED
TBCATEGORY6	IntQABrandA	5	5	RESERVED
cat 2	IntQABrandA	10	3	RESERVED
cat 3	IntQABrandA	20	4	RESERVED
TBCATEGORY7	IntQABrandA	5	5	RESERVED
TBCATEGORY8	IntQABrandA	5	5	RESERVED
TBCAT10	IntQABrandA	5	5	RESERVED
TBCAT11	IntQABrandA	5	5	RESERVED

Figure 38 - Coupon Manager Interface

The Coupon Manager page includes the following sections:

- **Local navigation bar**—Displays **All Categories**. You can click **All Categories** to return to the Coupon Manager dashboard at any time. Use this navigation bar to understand where you are within the Coupon Manager process.
- **Left navigation and action panel**—Includes the **Add New Category** button. Click **Add New Category** to add a new coupon category. The **Add New Category** page

opens and you can define the coupon information: for example, brand, generation method, capacity, and length.

Beneath the Add New Category button there are filtering options for the All Categories coupon list; by brand and by coupon status. Click on a brand or coupon status filtering option to refresh the All Categories coupon list with only coupon categories that match your filtering selection. Which brands you can see depends on your user account. The possible coupon category statuses are:

- **In progress**—The coupon category’s coupons are in the process of being generated.
- **Available**—The coupon category is available for you to use with an interaction.
- **Reserved**—The coupon category is reserved for another interaction/campaign. (Coupon categories become reserved during the interaction activation process.)
- **Locked**—The coupon category is locked and cannot be used until it is released. (You can lock a coupon category to hold it for future use.)
- **Failed**—The coupon category’s coupons failed to generate.

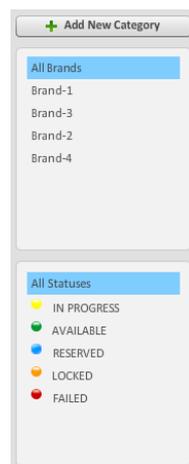


Figure 39 - Left Navigation and Action Panel (Coupon Manager)

- **Workspace/dashboard section**—Displays the All Categories coupon list, which lists all the existing coupon categories. Use the filtering options in the left panel to manipulate what appears in the list. Select a coupon category, and then click the properties icon (i). To view its high-level information.
- **Coupon category properties panel**—The properties panel displays on the right side of the interface. By default this panel remains closed until you choose to open it. To view the coupon category’s overview details, select an event and then click the properties icon (i). Once the properties panel is open, click on another coupon category in the All Categories coupon list to display its properties in the properties panel. To close the properties panel, click the properties icon again. The coupon category’s properties panel includes the following sections:

- **Action buttons**—Includes the Lock and Release buttons. To lock an available coupon category, click **Lock**. To release a locked coupon category, click **Release**.
- **Category Details**—Displays the brand this coupon category is associated with, the coupon generation and validation methods, capacity, length, and coupon category status.
- **Coupons Preview**—Displays a preview list of coupons (maximum of 20) generated for this coupon category.
- **Actions**—Includes a drop-down menu with the options to export coupons and to validate coupons. Select **Export All Coupons** and the Actions section refreshes and displays an addition field/button to perform coupon exporting. Select **Validate a Coupon** and the Actions section refreshes to display an addition field/button to perform coupon validation. The list of coupons is exported to a file and saved on the mGage™ MS server at `<server_path>/../deploy/marketing-suite-resources/coupons/generated/<AccountName>/<BrandName>/<CategoryName>`.

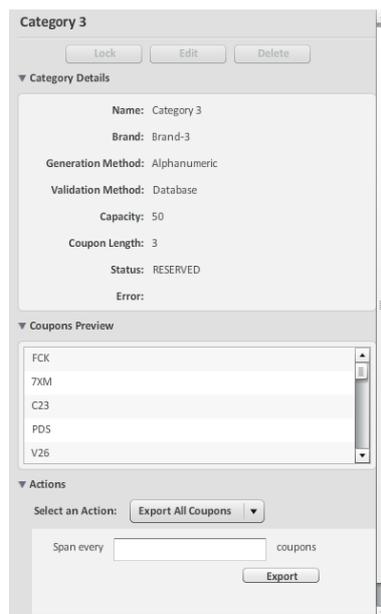


Figure 40 - Coupon Category's Properties Panel

6.2 Using the Coupon Manager Interface

You can perform the following tasks from the Coupon Manager page:

- “Creating a Coupon Category,” on page 112.
- “Viewing a Coupon Category,” on page 114.
- “Filtering the All Categories Coupon List,” on page 114.
- “Locking a Coupon Category,” on page 115.

- “Releasing a Coupon Category,” on page 116.
- “Validating Coupons,” on page 116.
- “Exporting Coupons,” on page 117.

6.2.1 Creating a Coupon Category

To use the On Pack interaction, you must first create a coupon category and generate a pool of coupons. When you create a pool of coupons, you determine the coupon length, type (for example, alphanumeric or numeric only), capacity, and range. When you generate coupons you also associate the coupons with a specific brand.

To create a coupon category:

1. From the mGage™ MS application navigation bar, click **Coupon Manager**.
The Coupon Manager page appears.
2. Click **Add New Category**.
The Add New Category page appears.
3. In the Category Info section, enter the following information:
 - a. In the **Name** field, enter a unique coupon category name.
 - b. In the **Description** field, enter a description for the coupon category.
 - c. From the **Brand** drop-down menu, select a brand to associate it with this coupon category.
4. In the Coupon Info section, enter the following information:
 - a. From the **Generation Method** drop-down menu, select the method that you want to use to generate the coupons for this category. The possible options are:
 - **Alphanumeric**—Generates coupons with a combination of alphabetic and numeric characters, for example; “MXPNV,” “6BMBM,” or “QMBB6”

Note: The Alphanumeric generation keyset only contains the following characters: 2,3,4,6,7,9,B,C,D,F,H,J,K,L,M,N,P,Q,R,S,T,V,W,X. Some characters are omitted as they might be difficult to distinguish in print. For example, the upper case letter ‘O’ and the number ‘0’ (zero).

 - **Custom Alphanumeric**—The Custom Alphanumeric generation method provides pre-defined keysets for coupon creation:
 - **Full Latin Alphabetic Keyset**—Generates coupons with the full set of alphabetic characters, for example; “OPQAA,” “TWQFB,” or “JVMQK”
 - **Full Latin Alphanumeric Keyset**—Generates coupons with a combination of the full set of alphabetic and numeric characters, for example; “46L,” “26F,” or “COL”
 - **Full Numeric Keyset**—Generates coupons with the full set of numeric characters, for example; “57823”, “87015”, or “27415”
 - **Trunc Latin Alphabetic Keyset**—Generates coupons with a limited set of alphabetic characters: B,C,D,F,H,J,K,L,M,N,P,Q,R,S,T,V,W,X

- **Trunc Latin Alphanumeric Keypset**—Generates coupons with a limited set of alphabetic and numeric characters: B,C,D,F,H,J,K,L,M,N,P,Q,R,S,T,V,W,X and 2,3,4,6,7,9
 - **Trunc Numeric Keypset**—Generates coupons with a limited set of numeric characters: 2,3,4,6,7,9
- **Numeric**—Generates coupons with only numeric characters, for example; “43929”, “64767”, or “24799”

Note: The Numeric generation keyset only contains the following characters: 2,3,4,6,7,9. Some characters are omitted as they might be difficult to distinguish in print. For example, the upper case letter ‘O’ and the number ‘0’ (zero).
 - **Ranged Numeric**—Generates coupons with only numeric characters, which are within the specified numeric range. For example, to generate coupons within the range from 2 to 8, in the **From** field enter 2 and in the **To** field enter 8. In this example, if you set Coupon Length to 2, then you would generate a coupon with a leading zero, for example, 04.

Note: When generating coupons, the Coupon Manager uses a formula that ensures only 20% of the total possible number of coupons that could be produced, are produced, given the keyset (number of different characters that can be used) and the coupon length. This ensures coupons are unpredictable and participants cannot easily guess them.
 - **Provided**—Use this option when you want to provide the Coupon Manager with the list of coupons. You need to upload the coupons file to the mGage™ MS server at `<Server_path>/../deploy/marketing-suite-resources/coupons/provided/<AccountName>/<BrandName>/<CategoryName>`
 - **None**—Use in combination with the Validation Method’s Pattern option to manually enter a specific coupon code.
5. In the **Capacity** field, enter how many coupons you want to generate.
 6. In the **Coupon Length** field, enter how many digits you want the coupon to be. Enter 5 to generate a coupon with exactly 5 digits, for example, “AW45L.”
 7. From the **Validation Method** drop-down menu, select a validation option. Possible Validation options are:
 - **Database**—This is the default validation method for most of the coupon generation methods. (Only the None validation method does not use the database validation option.)
 - **Pattern**—Use this option when you want to use coupon codes with a specific user-defined pattern. For example, you want coupons to start with the two letters ‘KB,’ followed by three numbers, followed by two more letters. Contact your mGage™ administrator to implement this type of coupon code.
 8. (Optional.) To ensure a participant can redeem a coupon even though they might have entered an erroneous character, which he or she confused for the correct character, select the **Replacement File** checkbox. For example, the participant has

coupon “ABQ32,” but mistakenly enters a ‘0’ (zero) instead of the letter ‘Q.’ The replacement file contains the more usually confused characters and defines how each should be substituted. Upon validation if the erroneous character is one of the characters defined in the replacement file, it is substituted for a valid character, in this case the number ‘0’ (zero) is replaced by the letter ‘Q’, and then Coupon Manager tries to validate the coupon again.

9. Click **Valid & Add**.

The All Categories page appears and displays the new coupon category in the All Categories coupon list.

6.2.2 Viewing a Coupon Category

You can view all coupons that your user account has access to from the Coupon Manager tab. You can view the following information for each coupon category; name, brand, generation method, validation method, capacity, coupon length, and status. You can also preview each coupon category’s coupons.

To view a coupon category:

1. From the mGage™ MS application navigation bar, click **Coupon Manager**.

The Coupon Manager page appears and displays the All Categories coupon list.

2. Filter the All Categories coupon list (in the left panel, use the by brand and by status filters) to locate the coupon category. See “Filtering the All Categories Coupon List,” on page 114, for more information about filtering the All Categories coupon list.

3. Select the coupon category, and then click the properties icon ().

The coupon category’s properties panel opens and displays the coupon category’s details.

6.2.3 Filtering the All Categories Coupon List

You can filter which coupon categories appear in the All Categories dashboard. For example, you can view all existing coupon categories, all coupon categories for a specific brand, or only coupon categories that have a specific status.

Use the by brand and by status filters to select which coupon categories appear on the All Categories dashboard (directly to the right). Brands are user-defined, and which brands you can see depend on your user account. The status filters are In Progress, Available, Reserved, Locked, and Failed. You can select more than one brand or status filter, at the same time, by holding down the Ctrl key and selecting each filter option.

To filter the All Categories coupon list by brand:

1. From the mGage™ MS application navigation bar, click **Coupon Manager**.

The Coupon Manager page appears and displays the All Categories coupon list.

2. In the left panel, select a brand.

The All Categories coupon list refreshes and displays only the coupon categories that match the selected brand.

3. In the left panel, select **All Statuses**. (If you do not select All Statuses, then you will only see the coupon categories for the specified status.)

The All Categories coupon list refreshes and displays only the coupon categories that match the selected brand (for all statuses).

To filter the All Categories coupon list by status:

1. From the mGage™ MS application navigation bar, click **Coupon Manager**.

The Coupon Manager page appears and displays the All Categories coupon list.

2. In the left panel, select **All Brands**. (If you do not select All Brands, then you will only see the coupon categories for the specified brand.)

3. In the left panel, select a status. The possible statuses are:

- **All Statuses**—Displays a list of coupon categories for all statuses.
- **In progress**—Displays a list of coupon categories that are in the process of being generated.
- **Available**—Displays a list of coupon categories that are available for you to use with an interaction.
- **Reserved**—Displays a list of coupon categories that are reserved for another interaction/campaign. (Coupon categories become reserved during the interaction activation process.)
- **Locked**—Displays a list of coupon categories that are locked and cannot be used until they are released. (You can lock a coupon category to hold it for future use.)
- **Failed**—Displays a list of coupon categories that failed to generate.

The All Categories coupon list refreshes and displays only the coupon categories that match the selected status (for all brands).

To filter the All Categories coupon list by brand and by status:

1. From the mGage™ MS application navigation bar, click **Coupon Manager**.

The Coupon Manager page appears and displays the All Categories coupon list.

2. In the left panel, select a brand.

The All Categories coupon list refreshes and displays only the coupon categories that match the selected brand.

3. In the left panel, select a status.

The All Categories coupon list refreshes and displays only the coupon categories that match the selected brand and selected status.

6.2.4 Locking a Coupon Category

To remove a coupon category from general use, you can lock the coupon category. Later you can release the coupon category for general use again.

To lock a coupon category:

1. From the mGage™ MS application navigation bar, click **Coupon Manager**.

The Coupon Manager page appears and displays the All Categories coupon list.

2. Filter the All Categories coupon list (in the left panel, use the by brand and by status filters) to locate the coupon category. See “Filtering the All Categories Coupon List,” on page 114, for more information about filtering the All Categories coupon list.

3. Select the coupon category, and then click the properties icon ().

The coupon category’s properties panel opens and displays the coupon category’s details.

4. Click **Lock**.

The properties panel closes, the All Categories coupon list refreshes, and the selected coupon category’s status displays as LOCKED.

6.2.5 Releasing a Coupon Category

You can release a coupon category that was previously locked and removed from general use.

To release a coupon category:

1. From the mGage™ MS application navigation bar, click **Coupon Manager**.

The Coupon Manager page appears and displays the All Categories coupon list.

2. Filter the All Categories coupon list (in the left panel, use the by brand and by status filters) to locate the coupon category. See “Filtering the All Categories Coupon List,” on page 114, for more information about filtering the All Categories coupon list.

3. Select the coupon category to release, and then click the properties icon ().

The coupon category’s properties panel opens and displays the coupon category’s details.

4. Click **Release**.

The properties panel closes, the All Categories coupon list refreshes, and the selected coupon category’s status displays as AVAILABLE.

6.2.6 Validating Coupons

You can manually validate a coupon if you know the coupon category it belongs to. Coupons are case-sensitive.

To validate a coupon:

1. From the mGage™ MS application navigation bar, click **Coupon Manager**.

The Coupon Manager page appears and displays the All Categories coupon list.

2. Filter the All Categories coupon list (in the left panel, use the by brand and by status filters) to locate the coupon category. See “Filtering the All Categories Coupon List,” on page 114, for more information about filtering the All Categories coupon list.

3. Select the coupon category that contains the coupon, and then click the properties icon ().

The coupon category's properties panel opens and displays the coupon category's details and action buttons.

4. In the Actions section, from the **Select An Action** drop-down menu, select **Validate a Coupon**.

The Actions section refreshes and displays the Coupon field and Validate button.

5. In the Coupon field, enter the coupon code, and then click **Validate**.
 - If the coupon is valid, a green check mark (✓) and the text "Valid Coupon" appear.
 - If the coupon is not valid, a red x-mark (✗) and the text "Invalid Coupon" appear.

6.2.7 Exporting Coupons

You can export a coupon list if you know the coupon category it belongs to.

To export a coupon category:

1. From the mGage™ MS application navigation bar, click **Coupon Manager**.

The Coupon Manager page appears and displays the All Categories coupon list.

2. Filter the All Categories coupon list (in the left panel, use the by brand and by status filters) to locate the coupon category. See "Filtering the All Categories Coupon List," on page 114, for more information about filtering the All Categories coupon list.
3. Select the coupon category, and then click the properties icon (i).

The coupon category's properties panel opens and displays the coupon category's details and action buttons.

4. In the Actions section, from the **Select An Action** drop-down menu, select **Export All Coupons**.

The Actions section refreshes and displays the Span every field and Export button.

5. In the **Span every** field, enter how many coupons to save to the export file before creating a new export file, and then click **Export**.

Use this option when the coupon category is very large and if exported would generate a very large export file. This option allows the coupons to be exported to multiple, smaller files. For example, if you produce 10,000,000 coupons, each with the length of 10 characters, and then export the coupons to a file, you will generate a 100MB file. A text editor might not be able to open a file of this size. If you set the Span every field to 100,000, then you will generate 100 smaller files with 100,000 coupons each.

Appendix A - Storyboard Options

A.1 Text 2 Win Storyboard Options

Use an interaction template to define the dialog between a campaign interaction (an activity) and an individual who chooses to opt-in. You can add as many conditions, actions, or dialogs that make sense for your campaign's interaction. You can choose to use a pre-defined dialog or create your own dialog by combining a condition and an action. Each user-defined dialog must have at least one condition and one action.

A condition determines when an action occurs. For example, when to send a message or award points to a participant.

Conditions have a set priority order within their condition group. There are three condition groups; Entries, Participants Group, and Participations. The priority order is the same for all the condition groups. The priority order is At Nth, Every N, and At Any. For example, if you included all three Entries conditions in the storyboard, At Nth will execute first. If it cannot execute, then Every N, second in priority, will execute instead. However, if both At Nth and Every N conditions can execute, only the higher priority, At Nth, will execute. Finally, if both At Nth and Every N cannot execute, then At Any, third in priority, will execute.

IMPORTANT: Each storyboard must have a dialog with either an At Any Entry or an At Any Participation condition. This guarantees that every individual that interacts with the interaction will trigger a response.

Conditions from different condition groups execute in parallel. For example, both At Every N Entry and Every N New Participation can execute at the same time as well At Every N Entry and At Nth New Participation.

Table 13 - Text 2 Win Interaction Template Condition Options

Condition	Definition
Entries	These conditions count entries per individual. Individuals can send multiple entries and each entry is included when calculating the Entries conditions.
At Any Entry	Use this condition to trigger the action or dialog for each and every entry of an individual. An individual that sends more than one entry is targeted each time the individual sends an entry.

Condition	Definition
Every N Entries	Use this condition to trigger the action or dialog each time the set number of entries occurs per individual. For example, set Every N Entries to twenty. When an individual sends the twentieth entry, it triggers an action or dialog targeted at the individual. The action or dialog is triggered again for the individual's fortieth entry, and so on.
At Nth Entry	Use this condition to trigger the action or dialog when the specified entry amount occurs per individual. For example, set At Nth Entry to one hundred. When an individual sends the individual's one hundredth entry, it triggers an action or dialog targeted at the individual.
Participants Group	These conditions count new participants for the interaction.
At Any New Participant	Use this condition to trigger an action or dialog for each and every new participant (unique individuals) for the interaction. The action or dialog is triggered on the participant's first entry. An individual that sends more than one entry is targeted only once (at the time of the first entry).
Every N New Participants	Use this condition to trigger an action or dialog each time a new participant of the specified order sends an entry to the interaction. For example, set Every N New Participants to four. When the fourth new participant (unique individual) sends an entry (their first entry) it triggers the action or dialog. The action or dialog is triggered again for the eighth new participant, and so on. In other words, there might be twenty entries, but only four new participants, with some participants sending multiple entries. The fourth unique individual to participate is considered the fourth new participant.
At Nth New Participant	Use this condition to trigger an action or dialog when a new participant is the Nth new participant for the interaction. For example, set At Nth New Participant to ten. When the tenth new participant (unique individual) sends an entry (their first entry) it triggers the action or dialog. In other words, there might be twenty entries, but only ten new participants, with some participants sending multiple entries. The tenth unique individual to participate is considered the tenth new participant. There can be only one Nth new participant.
Participations	These conditions count entries (or participations) per interaction.
At Any Participation	Use this condition to trigger an action or dialog each and every time an individual (participant) participates (sends an entry) in the interaction.

Condition	Definition
At Nth Participation	Use this condition to trigger an action or dialog when the entry (or participation) is the Nth entry for the interaction. For example, set At Nth Participation to six. When the sixth entry occurs, it triggers the action or dialog, which is targeted at the individual who sent the sixth entry. There can be only one Nth participation.
Every N Participation	Use this condition to trigger an action or dialog <i>each</i> time the specified number of entries occur for the interaction. For example, set Every Nth Participation to five. When the fifth entry occurs, it triggers the action or dialog, which is targeted at the individual who sent the fifth entry. The action or dialog is triggered again when the tenth entry occurs, and so on.

An action is the response by mGage™ when a specific condition is met. (An entry is defined as each time an individual engages with an interaction, for example, sends an SMS or clicks a banner.) For example, in response to an entry, you can send a message or send a message and award points to the participant. (A participant is a unique individual who sends one or more entries. Once an individual sends an entry, they become a participant.)

Table 14 - Text 2 Win Interaction Template Action Options

Action	Definition
Award With Points	Use this action to award points to the participant that is defined by the condition.
Send Simple Message	Use this action to send a message to the participant that is defined by the condition.
Send Pool Message	Use this action to set up a pool of messages that can be sent to the participant that is defined by the condition. The participant is sent one message, which is randomly selected from the message pool.

A dialog is a combination of a condition and one or more actions. There are several pre-defined dialogs, which you can customize.

Table 15 - Text 2 Win Interaction Template Dialog Options

Dialog	Definition
Random Response Dialog	Use this dialog to send a message to the participant for each entry. The participant is sent one message for each entry, which is randomly selected from the message pool.
Random Response Dialog with Points	Use this dialog to send a message to the participant for each entry, and to award the participant points. The participant is sent one message for each entry, which is randomly selected from the message pool.

Dialog	Definition
Welcome Dialog	Use this dialog to send a message to the participant the first time they send an entry.
Welcome Dialog with Points Awards	Use this dialog to send a message to the participant the first time they send an entry, and to award the participant points.

A.2 Vote And Poll Storyboard Options

Use an interaction template to define the dialog between a campaign interaction (an activity) and an individual who chooses to opt-in. You can add as many actions that make sense for your campaign's interaction.

A condition determines when an action occurs. For example, when to send a message or award points to a participant. Each condition requires at least one action.

An action is the response to an entry. (An entry is defined as each time an individual sends an entry.) For example, in response to an entry, you can send a message or send a message and award points to the participant. (A participant is a unique individual who sends one or more entries. Once an individual sends an entry, they become a participant.)

Table 16 - Vote And Poll Interaction Template Action Options

Action	Definition
Award With Points	Use this action to award points to the participant that is defined by the condition.
Send Simple Message	Use this action to send a message to the participant that is defined by the condition.
Send Pool Message	Use this action to set up a pool of messages that can be sent to the participant that is defined by the condition. The participant is sent one message, which is randomly selected from the message pool.

A.3 On Pack Storyboard Options

Use an interaction template to define the dialog between a campaign interaction (an activity) and an individual who chooses to opt-in. You can add as many conditions and actions, or dialogs that make sense for your campaign's interaction. You can choose to use a pre-defined dialog or create your own dialog by combining a condition and an action. Each user-defined dialog must have at least one condition and one action.

A condition determines when an action occurs. For example, when to send a message or award points to a participant. Each condition requires at least one action.

IMPORTANT: Each On Pack storyboard must have at least three dialogs with the following three conditions (and associated actions) set to Any; At Any Coupon Of Category, At Not Redeemable Coupon Of Category, and At Incorrect Coupon Of

Category. If the Any option is not set, then the same three conditions must be set for each coupon Category that is included in the interaction template. For example, an On Pack storyboard has Category 1 and Category 2. Therefore the storyboard must have at least six dialogs; At Any Coupon Of Category set to Category 1, At Any Coupon Of Category set to Category 2, At Not Redeemable Coupon Of Category set to Category 1, At Not Redeemable Coupon Of Category set to Category 2, At Incorrect Coupon Of Category set to Category 1, and At Incorrect Coupon Of Category set to Category 2.

Table 17 - On Pack Interaction Template Condition Options

Condition	Definition
Categories	These conditions apply to all coupon redemptions for all coupon categories, unless the coupon category is defined. Participants can send multiple coupons and each coupon redemption is included when calculating the Categories conditions. The coupon redemption count is per individual.
Every N Coupons	Use this condition to trigger an action each time the individual redeems the specified number of coupons. For example, set Every N Coupons to twenty. When the individual redeems the twentieth coupon it triggers an action targeted at the individual. The action is triggered again for the fortieth coupon redemption, and so on.
At Incorrect Coupon of Category	Use this condition to trigger an action when an individual tries to redeem a coupon, but due to an error the individual sends the wrong coupon code. For example, set At Incorrect Coupon of Category to Category 1. An individual tries to redeem a coupon for Category 1 by sending an erroneous coupon code. The erroneous code triggers an action targeted at the individual who tried to redeem the coupon. For example, set At Incorrect Coupon of Category to Any. An individual tries to redeem a coupon for Category 1 (or any other category) by sending an erroneous coupon code. The erroneous code triggers an action targeted at the individual who tried to redeem the coupon. In both cases, the coupon itself is valid, but the individual made an error when redeeming the coupon. For example, the correct coupon code is 'ABC123', but the individual sent 'ABD123' by mistake.
At Nth Coupon	Use this condition to trigger an action when the specified number of coupons is redeemed. For example, set At Nth Coupon to ten. When the individual redeems the tenth coupon it triggers an action targeted at the individual.

Condition	Definition
At Not Redeemable Coupon of Category	Use this condition to trigger an action each time an individual tries to redeem a coupon that is not redeemable according to the specified category or all categories redemption policy. For example, set At Not Redeemable Coupon of Category to Category 1. When an individual tries to redeem a coupon that is not redeemable for Category 1, then it triggers an action targeted at the individual who tried to redeem the coupon. For example, set At Not Redeemable Coupon of Category to Any. When an individual tries to redeem a coupon that is not redeemable for Category 1 (or any other category), then it triggers an action targeted at the individual who tried to redeem the coupon. In both cases, the coupon code was sent correctly, but the coupon itself is not redeemable, for example, the redemption policy is UNIQUE_PER_USER and the coupon was already redeemed on a different occasion.
At Any Coupon of Category	Use this condition to trigger an action each time an individual redeems a coupon for the specified category. For example, set At Any Coupon of Category to Category 1. Each time an individual redeems a coupon for Category 1 it triggers an action targeted at that individual. For example, set At Any Coupon of Category to Any. Each time an individual redeems a coupon for Category 1 (or any category) it triggers an action targeted at that individual.

An action is the response to an individual redeeming a coupon. For example, in response to an individual redeeming a coupon, you can send a message or send a message and award points to the individual.

Table 18 - On Pack Interaction Template Action Options

Action	Definition
Award With Points	Use this action to award points to the individual that is defined by the condition.
Send Pool Message	Use this action to set up a pool of messages that can be sent to the individual that is defined by the condition. The individual is sent one message, which is randomly selected from the message pool.
Send Simple Message	Use this action to send a message to the individual that is defined by the condition.

A dialog is a combination of a condition and one or more actions. There are several pre-defined dialogs, which you can customize.

Table 19 - On Pack Interaction Template Dialog Options

Dialog	Definition
Random Response Dialog	Use this dialog to send a message to the individual each time he/she redeems a coupon. The individual is sent one message per coupon redemption, which is randomly selected from the message pool.
Welcome Dialog with Points	Use this dialog to send a message to the individual the first time he/she redeems a coupon, and to award the individual with points.
Random Response Dialog with Points	Use this dialog to send a message to the individual each time he/she redeems a coupon, and to award the individual with points. The individual is sent one message per coupon redemption, which is randomly selected from the message pool.
Welcome Dialog	Use this dialog to send a message to the individual the first time he/she redeems a coupon.
Not Redeemable Coupon Dialog	Use this dialog to send a message to the individual that the coupon he/she sent cannot be redeemed.
Incorrect Coupon Dialog	Use this dialog to send a message to the individual that the coupon he/she sent is invalid for this interaction.

A.4 Send Coupon Storyboard Options

Use an interaction template to define the dialog between a campaign interaction (an activity) and an individual who chooses to opt-in. You can add as many conditions, actions, or dialogs that make sense for your campaign's interaction. You can choose to use a pre-defined dialog or create your own dialog by combining a condition and an action. Each user-defined dialog must have at least one condition and one action.

A condition determines when an action occurs. For example, when to send a message, send a coupon, or award points to a participant.

Conditions have a set priority order within their condition group. There are three condition groups; Entries, Participants Group, and Participations. The priority order is the same for all the condition groups. The priority order is At Nth, Every N, and At Any. For example, if you included all three Entries conditions in the storyboard, At Nth will execute first. If it cannot execute, then Every N, second in priority, will execute instead. However, if both At Nth and Every N conditions can execute, only the higher priority, At Nth, will execute. Finally, if both At Nth and Every N cannot execute, then At Any, third in priority, will execute.

IMPORTANT: Each storyboard must have a dialog with either an At Any Entry or an At Any Participation condition. This guarantees that every individual that interacts with the interaction will trigger a response.

Conditions from different condition groups execute in parallel. For example, both At Every N Entry and Every N New Participation can execute at the same time as well At Every N Entry and At Nth New Participation.

Table 20 - Send Coupon Interaction Template Condition Options

Condition	Definition
Entries	These conditions apply to all entries. Individuals can send multiple entries and each entry is included when calculating the Entries conditions.
At Any Entry	Use this condition to trigger the action for each entry. An individual that sends more than one entry is targeted each time they send an entry.
Every N Entries	Use this condition to trigger the action each time the specified number of entries occurs. For example, set Every N Entries to twenty. When the twentieth entry is received it triggers an action targeted at the individual who sent the twentieth entry. The action is triggered again for the fortieth entry, and so on.
At Nth Entry	Use this condition to trigger the action when the specified entry amount occurs. For example, set At Nth Entry to a hundred. When the hundredth entry is received it triggers an action or dialog targeted at the individual who sent the hundredth entry.
Participants Group	These conditions apply to all participants, as a group.
Every N New Participants	Use this condition to trigger an action each time an individual becomes a new participant and they are the new participant of the specified order. For example, set Every N Participants to four. When the fourth new participant (unique individual) sends an entry (keyword) it triggers the action. The action is triggered again for the eighth participant, and so on. In other words, there might be twenty entries, but only four participants, with some participants sending multiple entries. The fourth unique individual to participate is considered the fourth new participant.
At Any New Participant	Use this condition to trigger an action for all new participants (unique individuals). The action or dialog is triggered the first time the individual sends an entry. An individual that sends more than one entry is targeted only once at the time of the first entry.

Condition	Definition
At Nth New Participant	Use this condition to trigger an action for the individual who is the specified new participant by the order of participation. For example, set At Nth Participant to ten. When the tenth new participant (unique individual) sends an entry (their first entry) it triggers the action. In other words, there might be twenty entries, but only ten participants, with some participants sending multiple entries. The tenth unique individual to participate is considered the tenth new participant.
Participations	These conditions apply to each participant, as an individual. The specified numbers are compared to how many times the individual participates (sends an entry).
At Nth Participation	Use this condition to trigger an action when the individual sends the specified number of entries. For example, set At Nth Participation to six. When the individual sends his/her sixth entry it triggers the action.
At Any Participation	Use this condition to trigger an action each time an individual (participant) participates (sends an entry).
Every N Participation	Use this condition to trigger an action <i>each</i> time the individual sends the specified number of entries. For example, set Every Nth Participation to five. When the individual sends an entry for the fifth time it triggers the action. The action is triggered again for the tenth entry, and so on.

An action is the response to an individual sending an entry. (An entry is defined as each time an individual sends an entry.) For example, in response to an individual sending an entry, you can send a message or send a message and a coupon to the participant. (A participant is a unique individual who sends one or more entries. Once an individual sends an entry, they become a participant.)

Table 21 - Send Coupon Interaction Template Action Options

Action	Definition
Send Simple Message	Use this action to send a message to the participant that is defined by the condition.
Send Coupon	Use this action to send a coupon to the participant that is defined by the condition.
Send Pool Message	Use this action to set up a pool of messages that can be sent to the participant that is defined by the condition. The participant is sent one message, which is randomly selected from the message pool.
Award With Points	Use this action to award points to the participant that is defined by the condition.

A dialog is a combination of a condition and one or more actions. There are several pre-defined dialogs, which you can customize.

Table 22 - Send Coupon Interaction Template Dialog Options

Dialog	Definition
Welcome Dialog	Use this dialog to send a message to the individual the first time he/she sends an entry.
Random Response Dialog	Use this dialog to send a message to the individual each time he/she sends an entry. The individual is sent one message per entry, which is randomly selected from the message pool.

Velti UK

4th Floor, Bastille Court
2 Paris Garden
London, SE1 8ND, UK

Tel: + 44 (0) 20 7633 5000

Fax: +44 (0) 20 7633 5001

Velti Greece

44 Kifissias Ave. 151 25
Marousi, Athens
Greece

Tel: +30 210 637 8800

Fax: +30 210 637 8888

www.velt.com

info@velt.com



London | New York | San Francisco | Boston | Athens | Madrid | Sofia | Nicosia |
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