



Cheetah Loyalty Messages

Configuration Guide

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Introduction

This document describes how to use Cheetah Loyalty to send emails and push notifications.

The intended audience is marketers who are already familiar with standard content marketing concepts. Administrator access to the Cheetah Loyalty Marketing Console is also required in order to follow along with the instructions. Some of the setup steps also require technical knowledge such as HTML and CSS.

Feature Highlights

Cheetah Loyalty provides powerful capabilities for running campaigns to reach customers with rich messages.

- **Email** and **push notification** channels
- **Audience**-based targeting
- **Send** manually as a batch, configure a schedule, or as a triggered autoresponder
- **Personalization** such as name, salutation, and point balance
- **Multi-lingual** content
- **Dynamic content** includes offers, challenges, or rewards
- **Targeted offers** via campaigns and placements
- **Template Sets** and **Color Palettes** boost productivity and consistency
- **Message Subscriptions** ensure members get the messages they want
- **Dashboards** show delivery, conversion, and progress towards objectives

Cheetah Loyalty provides “multi-channel messaging” for email and push notifications. Email is the primary channel and much of this document focuses on email. For example most Message Subscriptions are described mostly for email use cases, but still be used for other channels.



Part 1: Setup

This section describes initial setup. Most steps in this section only need to be done once, or very rarely. Most of the instructions are high-level for easier readability and refer to [Appendix A](#) for deep-dives on particular topics.

ESP / Message Services

Sending an email relies on an outbound ESP (email service provider). This is normally configured for you by Cheetah Loyalty. See [Appendix A-1: ESP / Message Services](#) for details.

Whitelabeling

You must configure **whitelabeling** for your program. Whitelabeling is the functionality that shows ISPs that Cheetah Loyalty has your permission to send emails on your behalf. Recipient email servers and services read headers on the emails you send and check the DNS records to verify the email was initiated at a trusted source. This drastically increases your ability to deliver email. See [Appendix A-2: Whitelabeling](#) for detailed steps.

Also set your email-from and email-reply-to. These values are Content Tokens; see [Appendix A-2: Whitelabeling](#) for detailed steps.

Content Tokens

Content Tokens allow marketers to dynamically personalize messages by putting variables into content, such as using the token **first_name** inside an email message. You should create any content tokens you plan to use, such as “First Name”. See [Appendix A-3: Content Tokens](#) for detailed steps and suggestions.

Message Subscriptions

Cheetah Loyalty makes it easy to ensure your customers receive the messages they want. Keeping a light touch results in better open and click-through rates, and fewer unsubscribes. Always try to treat your members the way you would want to be treated by a brand you trust.

Message Subscriptions are Member Attributes

Message Subscriptions are simply member attributes. Cheetah Loyalty provides three by default. You can optionally modify the default message subscriptions or add your own. See [Appendix A-3: Message Subscriptions](#) for details.



- **Receive Personalized Offers:** on/off switch to receive offer messages
- **Receive Statements:** on/off switch to receive email statements
- **Receive Mobile App Offers:** on/off switch to receive Push Notifications

Communication Preferences

Cheetah Loyalty provides a “Communication Preferences” page for your members to manage their message subscriptions. Members can choose which kinds of messages they want to receive, such as “Receive Personalized Offers”, “Receive Statements”, “Receive Mobile App Offers”, “Receive Birthday Email”, and so on. Links in email footers such as “unsubscribe” or “manage communication preferences” lead to this page. If Cheetah Loyalty did not build a custom web app for you then you are recommended to customize this content page to “brand” it or point it at your web app. See [Appendix A-3: Message Subscriptions](#) for details.

Example: Communication Preferences Page

Here is an example of one style of Communication Preferences page that Cheetah Loyalty supports. This would require three Message Subscriptions, all of which are of type “text” and have the various value choices shown below.

<p>Communication Preferences</p> <p>Select your subscriptions below:</p>
<p>Personal Digest</p> <p>Keep me in the loop on my offers, rewards, and news:</p> <p><input checked="" type="radio"/> Daily <input checked="" type="radio"/> Weekly <input checked="" type="radio"/> Monthly <input checked="" type="radio"/> Never</p>
<p>Loyalist Newsletter</p> <p>Send me interesting articles, events, and rare offers:</p> <p><input checked="" type="radio"/> Frequently, 1-2 times a month <input checked="" type="radio"/> Occasionally, 1-2 times a year <input checked="" type="radio"/> Never</p>
<p>My Account</p> <p>Send me account statements and occasional program announcements:</p> <p><input checked="" type="radio"/> Monthly Statements <input checked="" type="radio"/> Annual Statements <input checked="" type="radio"/> Unsubscribe</p>
<p>[UPDATE MY PREFERENCES]</p>

Templates

Cheetah Loyalty uses Templates so that marketers can achieve predictable results even when working quickly. Cheetah Loyalty provides a **blank template** to get you started quickly, plus a full set of well-structured **default templates** which you can customize to



match your brand. If you find that you have specific needs you can replace them with **custom templates**.

Templates are intended to be highly reusable; many programs only have a single email template! This is done by using dynamic elements such as content tokens whenever possible. For example, rather than hard-coding colors templates can use color tokens which will load from Color Palettes. This allows the marketer who is composing the message to flip through multiple color palettes without loading different templates.

Included Templates

Blank Message Template

Cheetah Loyalty provides a blank template, which is simply a single large editable section, comparable to composing a new message in Gmail. Since the message is completely blank this template can be used directly without any setup, making it useful for training and quick testing. However this is not recommended for long-term use because the lack of structure will create a testing burden each time you want to send a message. You should graduate to using structured message templates as soon as you are ready.

Default Message Templates

Cheetah Loyalty provides a half-dozen generic responsive HTML email templates that you can customize or use as examples. These are “structured” messages that include a header, body, and footer with editable sections, dynamic content, and content tokens. You will need to customize them by adding your company name, logo, etc before use. Since the message structure is defined in the template, these templates have already been tested across all major email clients, desktop and mobile, reducing your test efforts when sending messages.

Color Palettes

As a best practice, marketers should choose from predefined/preapproved color palettes when creating content, rather than choosing ad-hoc (and possibly incorrect) colors or color combinations. Cheetah Loyalty provides a set of default color palettes which you can use directly or customize for your brand. You can have as many or as few color palettes as you like, with as many colors as you need. These are used by the other templates.

Other Templates: Offers, Challenges, Rewards

Other content objects also have default templates. All of the default templates are structured so that they work well together, such as including an offer inside an email or picking colors for an email from a color palette. So in general it's best to customize or design all of your templates together.

Getting Started

For your first email, just use the blank template.



We recommend you start with customizing the default templates even if you plan on creating your own from scratch. Customizing the default templates is easier, follows many of the same steps, and eliminates some sources of error. You should do this even if you are not planning on using the default message templates, because this will help to understand how templates work. This will also help you to see how Cheetah Loyalty handles standard email best practices such as the snippet/preheader, view web version link, unsubscribe link, as well as advanced features like personalization and dynamic content.

Customizing Default Message Templates

The default Message templates provided by Cheetah Loyalty is an HTML document that can be easily exported, edited, and then imported as a new version. You should customize your message template to add your company name, logo, and contact information. Just export the HTML file, make your changes, and then import it as a new version. See [Appendix B-1: Editing a Template Set](#) for details.

Building Your Own Message Template

If you do not want to use the Cheetah Loyalty default message template then you can build your own.

Step 1 - HTML Email Template: Just as with any other marketing platform, the first step is to build or buy a standard HTML email template. This is an ordinary email template that does not yet have any special markup such as Cheetah Loyalty tokens. Your template should follow standard email marketing best practices, such as responsive design. Always test your template across email clients.

Step 2 - Add Cheetah Loyalty Markup: Add Cheetah Loyalty markup to your HTML email template. The best way to do this is to download the default message template set and look at the structure of the HTML document, then copy/paste your template into the middle of that file.

You should also copy some elements from the default message template, especially the “unsubscribe” link, “view in browser” link, and snippet/preheader.

See [Appendix B-3: Template Set Syntax](#) for help on template syntax.

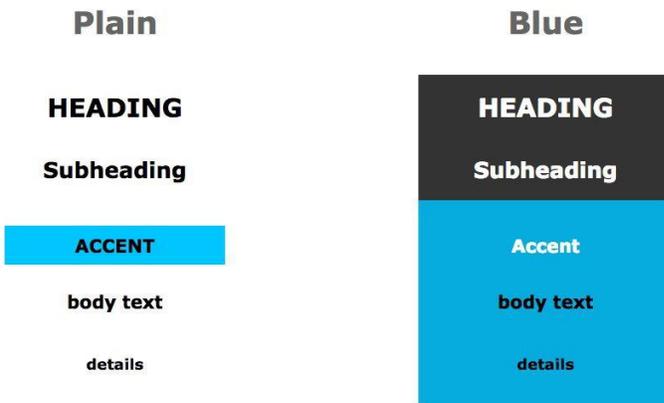
Step 3 - Upload into Cheetah Loyalty: Upload into the marketing console as a new Template Set. See [Appendix B-2: Adding New Template Sets](#) for details on this process. You should also upload any images as Static Files.

Step 4 - Test: Create a Message in Cheetah Loyalty test thoroughly across the email clients you intend to support. In building custom email templates for clients we have found testing tools such as Litmus to be extremely helpful.



Customizing Color Palettes

Cheetah Loyalty helps marketers to present a consistent brand image by using brand-approved color palettes instead of picking from ad-hoc custom colors. To customize the default color palettes provided by Cheetah Loyalty, edit the “color palettes” template set. This is an HTML document that you can edit to specify your brand colors, organized into named palettes. See [Appendix B-1: Editing a Template Set](#) for details.



Customizing Other Templates

You should also review and consider customizing the other default templates, at least for contents objects that you intend to use, such as Offers, Rewards, and Challenges. The process is the same as for Messages and Color Palettes. See [Appendix B-1: Editing a Template Set](#) for details.

Basic Triggered Messages

There are a few messages that you should always configure when first setting up your program, a Welcome message and a Forgot Password message. These are triggered messages, meaning they send themselves automatically at the right time. After your initial program setup and training, you can browse the Cheetah Loyalty Playbook for more ideas.

Welcome Message

As a best practice, always welcome new members to your program with a friendly email. This is a good idea even for simple newsletters, but is especially important for a loyalty program.

This message will use the “welcome” Message Trigger, which will automatically send the message whenever a new member signs up.

1. Go to Campaigns > Messages



2. Search for an existing welcome message; there can be only one.
3. Add a new email message named "Welcome"
 - a. Verify that Internal Name = "welcome" (see important note below)
 - b. Set Operational = checked (true)
 - c. Click Save to close the dialog
4. Leave the Audience set to "All Members"
5. Go to the Display tab:
 - a. Compose a nice friendly message to your new member.
 - b. Personalize your message by using the First Name content token. Use the Insert Token button in the content editor, which will result in HTML like this:
"Dear <em class="stl_token_first_name">friend..
 - c. Test your message content by clicking Send Test
6. Publish your message - click the Edit button on the right by the "Status Draft" text and then:
 - a. Set Send Mode = "Triggered"
 - b. Set Status = "Published"
 - c. Click the Save button
7. **Test** your message by signing up as a new member in your web or mobile app.

 **Message Trigger:** The internal name of the message must be "welcome" to use the "welcome" Message Trigger. Only one welcome message can be configured at a time, so if you can't set the internal name to "welcome" then look to see if you already have one. See [Appendix C: Message Triggers](#) for more details.

Unsubscribe Link: You will need to decide whether or not you want your Welcome email to have an Unsubscribe link. Most programs hide the Unsubscribe link in this case. If your message template hides the Unsubscribe link for Operational messages then you probably won't see the link. You can alternatively use a Message Subscription instead of the Operational flag.



Edit Message ✕

Display Name

Internal Name Edit Internal Name

Message Type

Description

Operational

Target Type

Image No file chosen

Tags

Tracking Code

Edit Message ✕

Status

Send mode

Trigger Activity

Assignees

Reset Password Instructions Message

When a member wants to login to your web or mobile app but can't remember their password, they click on a "Forgot Password?" link. After supplying their email address, Cheetah Loyalty sends an email message with instructions on how to reset their password, including a link to a Reset Password page.



You should write this message to be friendly and include instructions, which are simply to click the Reset Password link. Use the special system “stl_reset_password_link” content token for the link. See examples below for text and HTML versions of this message, including content tokens.

Sample Text Version

We received your request to reset your password for your {{stl_token_program_name}} account. Please click the button below to reset it.

{{stl_reset_password_link}}

If you did not request a password reset, please ignore this email or contact us at {{stl_token_support_email}}.

Thank you,
The {{stl_token_program_name}} Team

Sample HTML Email

```
<div>
  <p>We received your request to reset your password for your <em
class="stl_token_program_name" /> account. Please click the button below
to reset it.</p>

  <p class=""><a class="stl_reset_password_link stl-link-noclick"
href="#"><span style="color: rgb(255, 255, 255); text-decoration: none;
font-size: 18px;">RESET PASSWORD</span></a></p>
  <p>If you did not request a password reset, please ignore this email
or contact us at <em class="stl_token_support_email" />.</p>
  <p>Thank you,</p>
  <p>The <em class="stl_token_program_name" /> Team</p>
</div>
```

1. Go to Admin > Content > Content Tokens and create two new Static content tokens:
 - a. Program Name = “Loyalty Program”
 - b. Support Email = “support@example.com”
2. Go to Campaigns > Messages
3. Search for an existing welcome message; there can be only one.
4. Add a new email message named “Welcome”
 - a. Verify that Internal Name = “welcome” (see important note below)
 - b. Set Operational = checked (true)
 - c. Click Save to close the dialog
5. Go to the Display tab and write a nice message to your new member. You may want to use a content token such as First Name to be friendly.



6. Publish your message - click the Edit button on the right by the “Status Draft” text and then:
 - a. Set Send Mode = “Triggered”
 - b. Set Status = “Published”
 - c. Click the Save button
7. **Test** your message by signing up as a new member in your web or mobile app.

Test Members / Personas

Test Members are Members who represent typical “personas” that you expect to target with your messages. For example, you might create a Test Member for a “New Member” and another for a “Loyal Member”. To create a Test Member, add a new Member and tick the “Test Member” checkbox. Then configure the member attributes and activities to the desired shape. Sometimes it’s useful to look at existing members when modeling your Test Members.



Part 2: Basic Messages

Creating a Message

The first step is to create a new message. In general we recommend using campaigns for marketing messages because this allows goal-setting and tracking. Standalone messages can be useful for specialized messages, such as a triggered “forgot password” operational email.

Campaign Message

1. Go to the Campaigns tab and create a new campaign
2. Go to the Messages tab and create a message

Standalone Message

1. Go to Campaigns > Messages
2. Create a message

Message Type

Each message has a Message Type which determines the channel(s) to be used and provides the appropriate settings.

Emails are the primary message type and have the most options. Most of this document is email-centric.

Push Notifications are special-purpose messages and have limitations compared with email.

1. Push notifications can only be sent to members who have a mobile device registered.
2. Push notifications can only contain plain text.
3. Push notifications can specify a “target” content object such as an offer, if the mobile client has a place to display that content. Dynamic content/targeting is not supported.

Additional message types are expected soon, such as Text Messages, Facebook Messages, and Multichannel Message (mixed type message).



Audience

Each message has an Audience, which is the segment of members who will be targeted. Messages within a Campaign always use the Campaign Audience. This is further filtered by Message Subscriptions.

Message Subscriptions

Cheetah Loyalty makes it easy to ensure your customers receive the messages they want. Keeping a light touch results in better open and click-through rates, and fewer unsubscribes. Always try to treat your members the way you would want to be treated by a brand you trust.

Subscription Settings

To help prevent avoidable mistakes, Messages require you to choose at least one Message Subscription before sending. This automatically limits the audience to subscribers. For example, when sending out a monthly statement email you should choose "Receive Statements = true", and only members who are subscribed will receive that email.

✕
Subscription Settings

Enabled	Communication Preference	Option
<input type="checkbox"/>	Receive Mobile App Offers	true
<input type="checkbox"/>	Receive Mobile App Offers	false
<input type="checkbox"/>	Receive Personalized Offers	true
<input type="checkbox"/>	Receive Personalized Offers	false
<input type="checkbox"/>	Receive Statements	Monthly
<input type="checkbox"/>	Receive Statements	Never
<input type="checkbox"/>	Receive Statements	DAILY

Note: Only 1 setting will be applied for each communication preference.
Changing the settings will remove ineligible members from the list.

✕ Close
Save

Operational Messages

There is a special bypass to ignore all message subscriptions. You can open the message settings and set Operational = true. Please use this carefully, possibly only for triggered



system messages such as “forgot password” or for very important legal messages such as “terms of service”..

Send a Message

Messages can be sent manually, scheduled, or triggered.

- **Manual:** The message batch will be sent when you click the Send Message button. Manual messages can be sent multiple times.
- **Scheduled:** The message batch will be sent on the date/time you specify. Scheduled messages can optionally be recurring, such as an email that is sent every Tuesday.
- **Triggered:** The message will be sent automatically based on a system event or Member Activity, such as signup, purchase, or store visit. This is ideal for messages such as new member “welcome”, forgot password, post-visit survey, or a receipt

How to Send a Message Manually

A “manual” message is sent when you click on the Send Message button. This sends a batch of messages. To send a message manually:

1. Think about who you want to send your message to and what you want to tell them
2. Create a message
3. Choose appropriate **Message Subscriptions** to respect communication preferences
4. Configure the message **Audience**
5. Edit the message **Display** content
6. Test the message using **Send Test**
7. Leave **Send Mode** set to “Manual” (the default)
8. Change message **Status** to Published
9. Click on the **Send Message** button

Advanced - Multiple Sends: You can click the Send Message button multiple times. This can be used as a way to test the message, or if you want to send the message a couple of times manually. This is not recommended if you are intending to change the Audience between batches, because it will make the results harder to interpret. Instead you should consider creating a Clone of the message and then change the audience in the clone

How to Send a Scheduled Message

A “scheduled” message is similar to a “manual” message, except that the message batch is scheduled for a particular date and time. Setting the message to Published activates the schedule. To send a scheduled message:



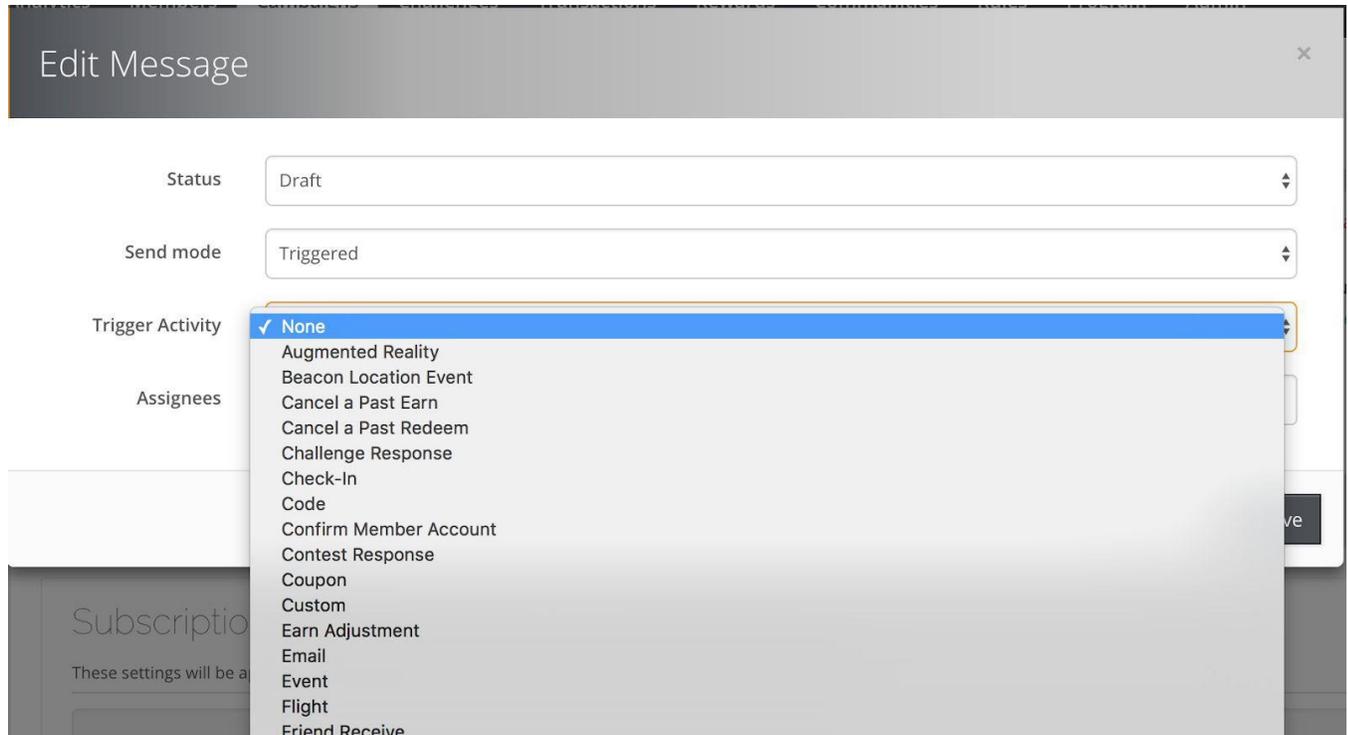
1. Think about who you want to send your message to and what you want to tell them
2. Create a message
3. Choose appropriate **Message Subscriptions** to respect communication preferences
4. Configure the message **Audience**
5. Edit the message **Display** content
6. Test the message using **Send Test**
7. Change **Send Mode** set to “Scheduled” and set the schedule
8. Change message **Status** to Published

Advanced - Recurrence: Scheduled Messages can optionally have recurrence, such as an email that is sent every Tuesday. Think carefully about using recurring messages. Customers usually respond best to “fresh” content, so a recurring message should probably use Dynamic Content.

How to Send a Triggered Message

A “triggered” message is sent automatically based on a system event or Member Activity, such as signup, purchase, or store visit. This is ideal for messages such as new member “welcome”, forgot password, post-visit survey, or a receipt. To send a triggered message:

1. Think about who you want to send your message to and what you want to tell them.
2. Create a new message
 - a. Set the Internal Name to match the name of a **Message Trigger**; see [Appendix C: Message Triggers](#) for a list of values.
 - b. Set Operational = checked (true)
3. Edit the message **Display** content
 - a. Test the message using **Send Test**
4. Change **Send Mode** set to “Triggered” and choose the **Trigger Activity**
5. Change message **Status** to Published



Testing

You are responsible for all messages you send, and are strongly admonished to thoroughly test all messages before sending. The first step is to send a test message to yourself or an account that you can use for testing. There are two main ways to do this, the Send Test feature and by sending manually. The second step is for you to test the message across email clients.

Send Test

The Send Test feature allows you to send a copy of the message to one of your Test Members. This allows you to safely send the message to yourself or an account you control, but also helps you to test personalization such as tokens and dynamic content.

Send Manually

Another way to test is to temporarily set the message Send Mode to “Manual” and send the message to a limited Audience of members. This allows the message to be sent to multiple recipients, however, this can be risky since it will send a real message that could possibly reach real members if your Audience is not properly configured. The Send Test feature is much more safe and should be used whenever possible.







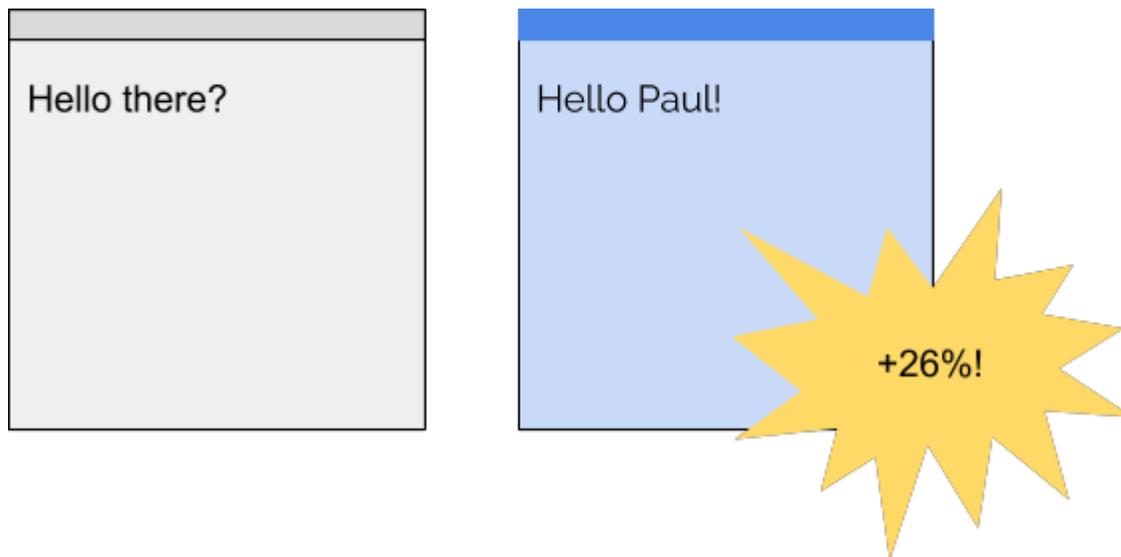
Part 3: Personalization

Cheetah Loyalty helps you make your messages a 1-to-1 engagement rather than a 1-to-many type email that's all too typical in our industry.

Overview

You can personalize messages and other content, including details such as name, salutation, and point balance. Members can also receive personalized content such as offers and challenges.

Even simple personalization increases email open rates by 26%.



Deeper personalization has many benefits including increased engagement, better relationships with your members, and even people getting excited to receive and open your email. Spotify showed a wonderful example with their 2016 year-end campaign showing each subscriber what their most listened songs were and where they ranked in their favorite artists' fan rankings (based on how many times they listened to their music).





Your 2016 in music: personalized stats and playlist



Your 2016, wrapped.

Hey Paul,

2016 has been a year. We made you a playlist of this year's songs that you loved the most. Play it while you read our rundown of your musical 2016, below.

[LISTEN NOW](#)





Personalize the Message Subject

Personalize Salutations

Messages frequently start with a salutation.

Personalize the Message Body

Point balance

Send Personalized Offers

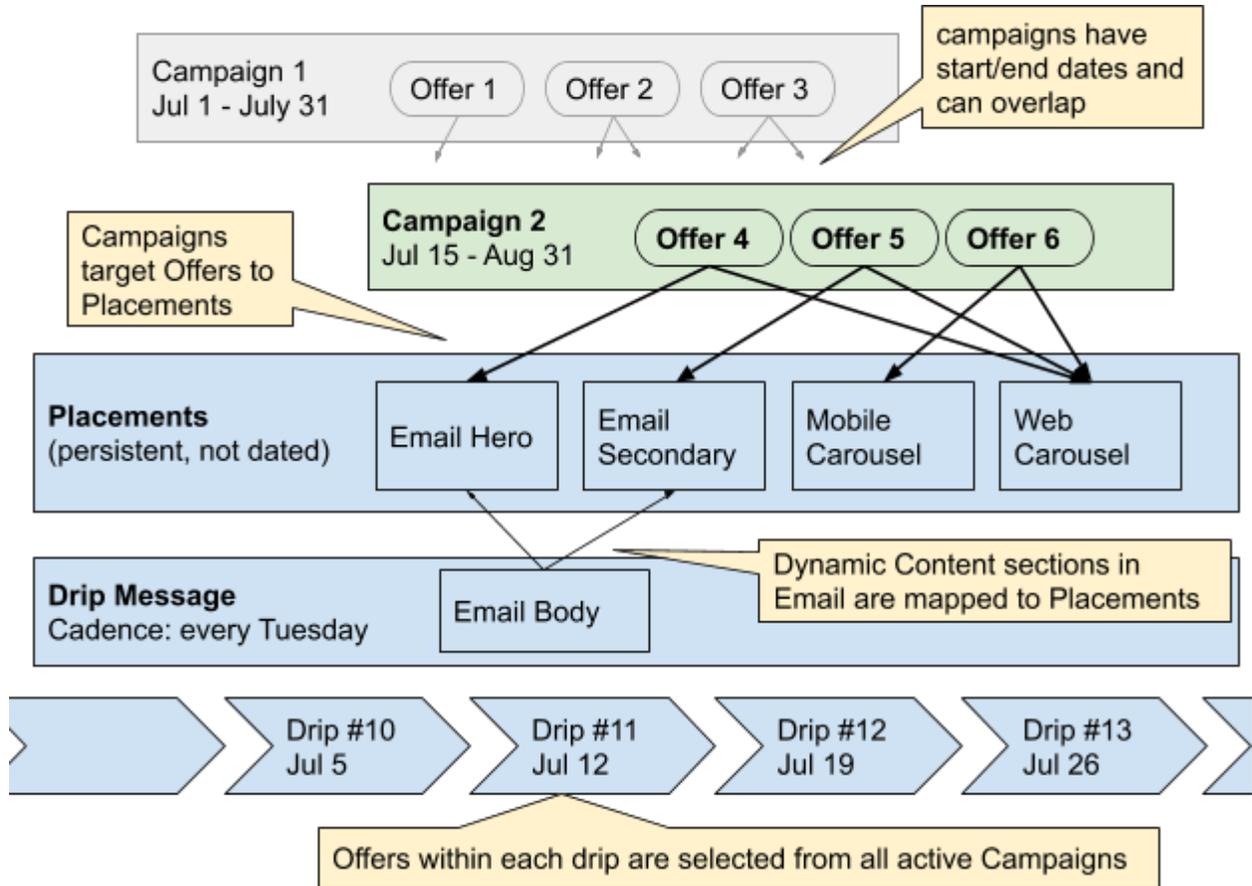
Send Personalized Challenges

Using Placements in Messages

Messages can use Placements to deliver offers from multiple concurrent Campaigns.

Using Placements inside scheduled or triggered drip messages creates an offer delivery channel across Campaigns. This means the marketer does not need to design a new email for every offer Campaign, and the message can potentially include content from multiple campaigns. This can also help prevent the problem of sending too many emails to members since fewer campaigns will need to send emails.









Using Content Tokens

The primary way to personalize messages is by using Content Tokens, special variables that insert member-specific values. For example, an email containing the token `first_name` will display the member's first name.

Tokens also allow a marketer to define simple, reusable bits of program content, such as the "from" email address when sending mailings. Tokens support localization, so these bits of content can vary based on the member's language preference.

Using Tokens

All tokens can be used in the content editor, either formatted as Token Elements or Merge Tokens. Tokens of type "merge" can contain the Merge Token syntax. The predefined system tokens are used implicitly in special places in the system, such as the Email From address.

The content editor will show a real-time preview of Test Members for all Token Elements.

Token Elements

Tokens can be inserted into content as Token Elements. These are valid DOM elements (such as a DIV, SPAN, EM, or IMG tag) with a CSS class in the format "stl_token_<token variable>". Examples:

```
Dear <div class="stl_token_firstname">Member</div>,
<span>Member #<span
class="stl_token_member_number">1234</span></span>
<a href="..." class="stl_token_webversion">View in Browser</a>
```

Apply To...

Each token has an **Apply To** setting which defines how the token value will be applied to the token element.

- **Text:** The token value will replace the inner HTML of the token element, so in the first example above, the text "Member" would be replaced by the member's first name, such as "Joe".
- **Link:** The token value is applied to the "href" attribute of the Token Element.

Since the token variable will be used as part of a CSS class name, it is critical that the token variable be validated as a valid CSS class name when defined by the admin.



If the member attribute value is empty or null, then the token “Default Value” should be used instead, even if the default value is blank.

Resource Attributes

Attributes of resources such as Offers, Challenges, and Rewards can be used as Content Tokens. Some use cases are:

- marketer wants to show Challenge Points in the challenge content
- marketer wants to show Reward Points in the reward content
- marketer wants to set the clickable button URL to the Offer URL

You can create this kind of token by choosing the type “Resource Attribute”, then chooses a Resource Type (e.g. Offer) and then a Resource Attribute (e.g. Offer => Action URL).

Dynamic Content

Messages can contain Dynamic Content sections. This allows the marketer to specify targeted content such as an offer, challenge, or reward to be dynamically inserted into the message.

Drip Messages

A “Drip Message” is a tactic using a Scheduled Message that includes Placements to deliver content from multiple concurrent Campaigns. Drip Messages create a stable channel that the marketer can depend on from Campaigns to target offers into the Placements.

Using Drip Messages means the marketer does not need to design a new email for every campaign, and the message can potentially include content from multiple campaigns. This also avoids the problem of sending too many emails to members.



Part 5: Sample Message Plays

This section contains examples of messages used in many loyalty programs. These are “Plays” from the Cheetah Loyalty Playbook, which you can browse for more ideas later.

Recurring Messages

These messages typically recur on a particular cadence, such as “once per week” or “once per month”. Note that this does not necessarily mean the message will be *scheduled with recurrence*, it’s perfectly fine to send these manually or schedule a single batch.

Monthly Statement Email

TODO - describe best practice and steps to send a monthly statement with a call to action

Triggered Messages

Birthday Email

Send members best wishes for their birthday. This usually includes a special promotion they can use for a few days before and after their birthday.

This message will use the Scheduled Jobs - GrantAnniversary action, which will automatically send the message with the promotion or reward 7 days before their birthday.

Steps to configure the birthday email

1. Go to Program > Member Attributes and add a new Member Attribute
 - a. Display Name = “Receive Birthday Email”
 - b. Type = Text
 - c. Values = “Yes” and “No”
 - d. Category = “Message Subscriptions”
2. Go to Campaigns > Messages
3. Search for an existing birthday message; there should be only one.
4. Add a new email message named “Birthday”
 - a. Set Subscription = Receive Birthday Email - yes
 - b. Click Save to close the dialog
5. Leave the Audience set to “All Members”
6. Go to the Display tab:
 - a. Compose a nice “happy birthday” message to your new member.



- b. Personalize your message by using the First Name content token. Use the Insert Token button in the content editor, which will result in HTML like this: “Dear <em class=“stl_token_first_name”>friend. Depending on the promotion, you can also add the reward name content token.
 - c. Don’t include personal information such as their birthday or how old they are
 - d. Test your message content by clicking Send Test
7. Publish your message - click the Edit button on the right by the “Status Draft” text and then:
 - a. Set Send Mode = “Triggered”
 - b. Set Status = “Published”
 - c. Click the Save button
8. Create a custom **Scheduled Job**
 - a. Go to the Admin tab and click Scheduled Jobs
 - b. Display Name = “Birthday Reward”
 - c. Recurrence = Repeat
 - d. Schedule Composer= Every day
 - e. Action type = Grant Anniversary
 - f. Content type = Either reward or offer
 - g. Content = Add featured reward or offer
 - h. Date Attribute = birthdate
 - i. Padding Days = 7
 - j. Date Search Strategy = Forwards
 - k. Send email? = Send email
 - l. Message = select message “Birthday email”
9. **Test** your message by signing up as a new member in your web or mobile app. Set your birthday to the next calendar day or so...and then wait



Appendix A: Setup Details

Appendix A-1: ESP / Message Services

SendGrid

Unless otherwise instructed, your program will be configured to send emails via SendGrid, and you do not need to do anything. Messages are sent via the SendGrid SMTP API, with delivery details returning via SendGrid webhook callbacks to Cheetah Loyalty APIs. SendGrid maintains abuse lists but Cheetah Loyalty handles click-tracking directly.

API Calls and Callbacks

-

TODO - document specific API calls and webhook callbacks

https://sendgrid.com/docs/API_Reference/Web_API_v3/Webhooks/event.html

```
curl -X "POST" "https://api.sendgrid.com/v3/mail/send" -H "Authorization: Bearer YOUR_API_KEY" -H "Content-Type: application/json" -d "[YOUR DATA HERE]"
```

Emarsys

TODO - document specific API calls and webhook callbacks

<http://documentation.emarsys.com/resource/developers/endpoints/>

ExactTarget

TODO - document specific API calls and webhook callbacks

Other ESP

In order to use another ESP, the appropriate whitelabeling and delivery webhook callbacks need to be available, similar to the ESPs above. To configure your program for another ESP, contact us and provide the following information:

- ESP Name
- SMTP address and port
- Domain: If you need to specify a HELO domain
- Authentication: username and password
- Any other details your ESP provides as standard for API usage



TODO - document specific webhook callbacks

[Delivery Callback](#)

[Bounce Callback](#)

[Spam/Abuse Callback](#)

TODO - also document Push Notification and SMS setup

Appendix A-2: Whitelabeling

SendGrid

Unless otherwise instructed, whitelabeling should be configured in SendGrid.

https://sendgrid.com/docs/User_Guide/Settings/Whitelabel/index.html

Note that Cheetah Loyalty routes email links through Cheetah Loyalty servers, so the SendGrid Link Domain setting is not used. You may omit this step during setup.

Email Headers

Cheetah Loyalty provides some content tokens for whitelabeling of email message headers. You should update these values to match your company email domain. Go to Admin > Content > Content Tokens and update the values for **Email From** and **Email Reply To**.

Email Links

Links in emails use the hostname configured for the Cheetah Loyalty Marketing Console, which is <yourbrand>.runstellar.com by default. Whitelabeling your Cheetah Loyalty Marketing Console hostname handles both the links in emails as well as any Content Pages that are hosted by Cheetah Loyalty, such as the default Communication Preferences page.



Content Tokens

Content Tokens allow a marketer to define simple, reusable bits of content, such as the "from" email address when sending mailings.

The screenshot shows a user interface for managing content tokens. At the top, there is a search bar and several filters: 'Any status', 'Any type', and 'Sort by Name'. Below this, two tokens are listed:

- Email From (system)**: Updated 8 months ago. Description: Variable: `email_from`. Token Type: Static. Status: Published. Published: October 09, 2016 5:52 PM (PDT).
- Email Reply To (system)**: Updated 8 months ago. Description: Variable: `email_reply_to`. Token Type: Static. Status: Published. Published: October 09, 2016 5:52 PM (PDT).

Tip: While you are on this page, also add some common content tokens (see next section)

Appendix A-3: Content Tokens

Most customers find it useful to configure a few content tokens during setup. Instructions for adding **First Name** are below.

1. Go to Admin > Content > Content Tokens
2. Type "First Name" and select token type "Member Attribute", then click "Create"
3. Choose the Member Attribute "First Name".
4. Set a Default Value like "Friend" in case any members do not have a first name set.
5. Leave API Visible=checked (true) so your web and mobile clients can use this token.
6. Click on "Save" and the dialog will close; your content token is now available for use.

Content Tokens

Content Tokens allow a marketer to define simple, reusable bits of content, such as the "from" email address when sending mailings.

This screenshot shows the same interface as above, but with a dropdown menu open over the 'First Name' input field. The dropdown menu contains the following options:

- Static
- Member Attribute** (highlighted)
- Merge
- Metric
- Activity Attribute
- Activity Line Items
- Resource Attribute

The 'Create' button is visible to the right of the dropdown.



Analytics Members Campaigns Challenges Transactions Rewards Communities Rules Program Admin

Edit Content Token

Display Name:

Variable: Edit Variable

Description: 250 characters left

Token Type:

API Visible:

Member attribute:

Apply To:

Default Value:

Sample Content Tokens

The tokens listed below are commonly used by other programs. For your convenience, Cheetah Loyalty automatically creates the tokens marked with an asterisk (*) but you can customize them as needed.

Token Name	Type	Setup
First Name *	Member Attribute	Member Attribute = First Name; Default Value = "Friend"
Last Name	Member Attribute	Member Attribute = First Name; Default Value = ""
Member ID *	Member Attribute	Member Attribute = Member ID
Email *	Member Attribute	Member Attribute = Email
Point Balance *	Metric	Metric = Point; Metric Value = Balance; Default Value = "0"
Full Name	Merge Token	Value = "{{stl_token_first_name}} {{stl_token_last_name}}"
Salutation	Merge Token	Value = "Dear {{stl_token_first_name}}, "
Program Name	Static	Value = "Loyalty Program"
Support Email	Static	Value = "support@example.com"



Support Phone	Static	Value = "(650) 555-1212"
Program Home	Static	Value = " https://example.com ", Apply To = "Link"

Merge Token Syntax

Merge Tokens are content tokens that can contain variables from other content tokens. Some common examples are listed in the table above, and more complicated examples follow below.

Basic Usage

- Enclose variables in double curly braces `{{}}`, e.g. "Dear `{{stl_token_first_name}}`", "
- Do not surround your merge token with quotes " " or those will appear in the output.
- Merge Tokens cannot contain other Merge Tokens, to prevent recursion.
- Like all tokens, you can localize the format for various customer locales.

Advanced Usage: Handlebars

Merge Tokens use [Handlebars](#) syntax, which has conditional logic and can accommodate even complicated needs. For basic syntax, refer to:

<http://handlebarsjs.com/expressions.html>. See below for various loyalty examples, some of which are quite advanced.

- A handlebars expression is a `{{`, some contents, followed by a `}}`. These can include other Content Tokens or conditional logic.
- Merge Tokens support two custom Handlebars operators, "iff" and "if_eq". Both are case-sensitive. Both allow **a** and **b** as tokens or literal values. The supported operators for "iff" are `===`, `>`, or `<`.
- The tilde ("`~`") character in the examples below is Handlebars "whitespace control".

Example: Cascading Defaults

This example shows how to test multiple attribute values, using the first that is not empty.

```

{{#if stl_token_card_id}}{{stl_token_card_id}}
{{~else}}{{stl_token_loyalty_card_id}}{{~/if}}

{{#if stl_token_card_id}}{{stl_card_id}}
{{~else if stl_token_card_id}}{{stl_card_id}}
{{~else}}#
{{~/if}}

```



Salutations

Salutations can be constructed as Merge Tokens. Even formal salutations with nuanced and complicated social rules are possible.

Example: USA Salutation

```
Dear {{stl_token_first_name}},
```

Example: Italian Salutation

```
{{#if stl_token_lastname~}}
  {{~#if_eq stl_token_gender 'f'~}}
    cara {{stl_token_lastname}}
  {{~else~}}
    caro {{stl_token_lastname}}
  {{~/if_eq}}
{{~else~}}
  caro
{{~/if}}
```

Example: German Salutation

```
{{#if stl_token_lastname~}}
  {{~#if_eq stl_token_gender 'm'~}}
    Sehr geehrter Herr {{stl_token_academicdegree}}
  {{stl_token_lastname}}
  {{~else if_eq stl_token_gender 'f'~}}
    Sehr geehrte Frau {{stl_token_academicdegree}}
  {{stl_token_lastname}}
  {{~else~}}
    Sehr geehrte(r) Herr/ Frau {{stl_token_academicdegree}}
  {{stl_token_lastname}}
  {{~/if_eq}}
{{~else~}}
  Sehr geehrte Damen und Herren
{{~/if}}
```

Message Template Content Tokens

Cheetah Loyalty has some content tokens with special behavior in Message Templates. These are not editable and do not appear in the list of content tokens.

Token Variable	Apply to	Behavior
----------------	----------	----------



stl_operational_hidden	element	Hides element if message setting Operational=true
stl_web_version	link	links to the “web version” of the email message
stl_unsubscribe	link	links to Communication Preferences content page.





Appendix A-3: Message Subscriptions

Message Subscriptions are member attributes.

Adding new Message Subscription

1. Go to **Program > Member Attributes**
2. Add a Member Attribute of type Boolean
3. Set the Display Name to what you want your members to see as the label.
4. Set Categories = "Message Subscriptions"
5. Optionally change Type = "String" and enter values your members can pick from.
6. Set the Default Value depending on whether you want opt-in or opt-out.
7. Leave API Visible checked (true)
8. **Deploy** a new program version and restart servers to make the new attribute available before continuing.
9. Verify that you see your new subscription in Messages. This will appear along with other subscriptions in the Message "Definition" tab.
10. Verify that your new subscription appears on your **Communication Preferences** page.
11. Verify that your new subscription appears on your **mobile and web apps**. Depending on how they were implemented you may need to request an update from your app developers before the new subscription settings appear.



Edit Member Attribute ✕

Display Name

Internal Name Edit Internal Name

Description 250 characters left

Type

Domain

Default Value

Categories

Read-Only

Required

API Visible

isCalculated

Appendix A-3: Customizing your Communication Preferences Page

To customize your Communication Preferences page:

1. Decide if you will “brand” the existing page or change the page to use an External URL.
2. Go to **Admin > Content > Content Pages > “Communication Preferences”**
3. To **brand** the page, use the Display tab to add your logo, title, intro text, colors, etc.
4. To use an **external page**, edit the page settings and set the Page Location = “External Page” and then fill in the Page URL field that will appear.

⚠ Warning: The internal name of this content page is “communication_preferences”. Do not delete the page or change the internal_name, because this page is used by the system for unsubscribe links.



Edit Content Page

Display Name: Communication Preferences

Internal Name: communication_preferences Edit Internal Name

Page Type: Standard page

Page Location: External page Stellar page

Page URL: Enter Page URL

Description: Communication Preferences Page (220 characters left)

Tags: Enter Tags

Page Access: Do not require login

Appendix B: Templates Reference

Appendix B-1: Editing a Template Set

1. Navigate to **Admin > Content > Template Sets**.
2. Find the Template Set and download the contents as an HTML file.
3. Edit the HTML file as needed.
4. Upload the modified file, which adds a new Template Set Version.
5. Either test the version in Draft status or Publish.
6. Messages and other content objects will automatically pick up the latest published version unless they were manually set to use a specific Template Set Version.



Appendix B-2: Adding New Template Set

1. Navigate to **Admin > Content > Template Sets**.
2. Create a new Template Set, choosing the Type from the list, such as "Messages".
3. Upload an HTML document.
4. Either test the version in Draft status or Publish.
5. Messages and other content objects will automatically pick up the latest published version unless they were manually set to use a specific Template Set Version.



Appendix B-3: Template Set Syntax

Layout Elements

Template Elements

- **stl_operational_hidden:** Hides the element if the message is operational. This is typically used for Unsubscribe links.

Dynamic Content Sections

Message templates support Dynamic Content Sections. This allows the marketer to specify an offer, challenge, or reward to be dynamically inserted into the message.

Each section is an HTML element with the CSS classes "stl_section stl_dynamic_content". The layoutId attribute specifies the layout to use; this defaults to "medium_rectangle" but should always be specified, especially for message templates.

```
<!-- Dynamic Content: primary -->
<div sectionId="email_section1" layoutId="medium_email_section"
class="stl_section stl_dynamic_content"></div>
```

Messages can have multiple dynamic content sections. Each section must have a unique **sectionId** attribute.

```
<!-- Dynamic Content: secondary -->
<div sectionId="email_section2" layoutId="medium_email_section"
class="stl_section stl_dynamic_content" contentType=""
contentFilter=""></div>
```

Content Pages also support dynamic content sections, but other content objects such as offers and challenges do not.

Editable Elements

Unsubscribe / Communication Preferences Links

The "Unsubscribe" link is a special system-managed link because it needs to associate the person clicking the link to a member. The link must use the special "stl_unsubscribe"



content token, which will take the member to the “communication_preferences” content page when clicked.

```
<a href="#" class="stl_unsubscribe">Unsubscribe</a>
```

You can optionally hide your unsubscribe link for operational messages.

```
<a href="#" class="stl_unsubscribe  
stl_operational_hidden">Unsubscribe</a>
```

Some brands prefer to have two links such as “Update your Communication Preferences or Unsubscribe”, but both links actually go the same place.

```
<p class="stl_operational_hidden">  
  <a href="#" class="stl_unsubscribe  
stl_token_update_subscription">Update your communication  
preferences</a> or  
  <a href="#" class="stl_unsubscribe  
stl_token_unsubscribe">Unsubscribe</a>  
</p>
```



Appendix C: Message Triggers

To bind a message to a basic message trigger, set the message Internal Name to the name of a Message Trigger in the table below. These are reserved message names and have special meaning in Cheetah Loyalty, automatically binding to a particular event.

If you need to trigger on something not in this list, you can create a custom Triggered Action instead of using a Message Trigger. In this case the internal name of the message does not matter, but should not match one of the Message Triggers.

Message Trigger	Usage
welcome	Member receives welcome email after sign-up
forgot_password	User clicks on "forgot password" and receives email has link to reset password
preferences_changed	Confirmation
password_changed	Password Changed
receipt_manual_processing	Receipt will go to manual processing
receipt_failed_invalid_receipt	Invalid Receipt
receipt_email_not_recognized	Email Used For Receipt is not Recognized
digital_giftcard_purchase	Giftcard Purchase
giftcard_auto_reload	Giftcard Auto Reload
code_response_success	