

A brief guide to getting started with your new automated marketing software.

This guide will help you setup your account administration and understand your new marketing platform.



Table Of Contents

- <u>Setting up your account with a FetchRev Marketing Specialist</u>
 o FetchRev Marketing Specialists are here to help you!
- What you will need on your First Call
- Getting Paid
- Integrating with MINDBODY
- Installing the Website Plugin or Pop-up
 - PART 1 Creating your Plugin with FetchRev
 - PART 2 Installing the code in MyStudio
 - PART 3 Placing Prepaid Items on the Client's Account
- Setting up your New Client Offer
 - Importing a New Client Trial Template
 - Ready-Made New Client Trial Templates
 - Launching your New Client Special to your website
 - How do I know it is working or that people are using it?
- How to redeem customers
 - Why Redeem Vouchers?
- Importing your client list
- Refunding a Client Purchase
- Further Resources to get you Started:

Setting up your account with a FetchRev Marketing Specialist

Welcome to FetchRev!

Your first step on your journey of automated marketing is to get the administrative side of your account set up. This includes where your customers can contact you as well as where you will get paid. FetchRev Marketing Specialists are here to help at each step.

FetchRev Marketing specialists will be your main contact at FetchRev and you can reach them Monday – Friday from 8am PST—5pm PST at 877-394-2410 or support@FetchRev.com

FetchRev Marketing Specialists are here to help you!

- get your account up and running
- advise marketing best practices
- troubleshoot when things go wrong
- provide training on how to use the product
- create and deploy campaigns for you if you are on the FetchRev Standard plan
- help with any billing concerns or changes
- answer any questions about FetchRev, your account, or your campaigns

FetchRev Marketing specialists work with a team of copywriters, designers, and engineers to help make your campaigns succeed.

If you have any questions about the look and feel of your campaign or a product glitch, your first step is to call or email your FetchRev Marketing Specialist. Call us at 877-394-2410 or email support@getFetchRev.com today!

What you will need on your First Call

The first call with FetchRev will focus on account setup. This takes approximately 20–60 minutes depending on your internet speed and access to information.

Equipment you will need:

- Desktop Computer (iPads will add extra time)
- Comfortable chair and interruption-free space
- Firefox or Chrome browser.
 - Safari or Opera will also work but are not recommended
 - Internet Explorer will <u>not</u> work on your set up call.
 - In general it's best to avoid Internet Explorer due to ease of virus attacks.

Please have the following information available on your first call:

- 1. Business bank account and routing number
- 2. Business EIN and legal name
- 3. Credit card to use for the monthly subscription
- 4. Access to your Facebook page admin
- 5. Login credentials for your email provider (constant contact, mailchimp...)
- 6. Access to MyStudio and your Studio ID
- 7. Twitter username and password (Optional)
- 8. A cvs file of your Current Member and/or Associate Member List (Optional)

Getting Paid

On your first call you will be setting up the basic information about your account, connecting your social media accounts, setting up how you get paid (via Stripe.com).

ACCOUNT INFO	BUSINESS INFO	SOCIAL MEDIA	PAYMENTS •	CUSTOMERS
LocBox uses Stri your LocBox can	pe Connect to process paymer npaigns.	nts from your customers. Pleas	e set up an account to enable pu	rchases on
S Connect	with Stripe			
Back: Social Media			Skip this step »	Next: Customers

<u>Stripe.com</u> is our payment processor. Your Stripe account is separate from your FetchRev account and only you have access to this account. Be sure to use a different login and password for Stripe than your FetchRev account.

IMPORTANT: Keep this Stripe username and password somewhere safe, as this account is separate from FetchRev

Your FIRST Stripe payment will put a seven day hold on your new Stripe.com account. During this time,Stripe.com will put \$1 (or less) into your bank account and then take the \$1 out of the account. On the 8th day after the first purchase, all purchases made during the first seven days will be transferred to your account.

You can see your total purchases in your FetchRev account or your Stripe.com account. Any refunds can be made in full through FetchRev or Stripe or a partial refund can be made through Stripe.

Integrating with MINDBODY

FetchRev integrates with MINDBODY (MB) so that purchase amounts automatically reflect in your MB site the day after purchase.

Don't worry we can help walk you through these steps and call your FetchRev Marketing Specialists at 877-394-2410 if you have any questions.

IMPORTANT: To set up the MINDBODY Integration, you will need your MB studio login URL.

How to Connect FetchRev and MBO:

- 1. On the "Connect Customers" page during onboarding, enter your Studio Login and URL and hit SAVE.
 - a. If correct, you will be prompted with a red dialogue box that includes a strange long red URL link.
 - b. Tell your marketing specialist your MINDBODY Studio ID.
 - c. Your marketing specialist will connect with the support center to connect your account. This may take a few days to connect.
- 2. Your purchases will be pushed to MB on a daily basis (all purchases will be pulled in at 1am from the day before, 12am–11:59pm)

The transactions will be entered with a cash equivalent payment method and will be added to the sales subject to royalty. Even though FetchRev is considered a third party payer, the traditional instructions for entering sales and payments from a third party payer should not be followed, follow these instructions instead for FetchRev sales.

New Items in MINDBODY

- 1. Pricing Option: "FetchRev Purchase"
- Will display in the Non-Member pricing options section on the Retail screen
- Is not setup to pay for any massage sessions
- Should not be used for client transactions

2. Payment Method: "Stripe"

- Will not display on the Retail screen
- Cash-equivalent payment method

3. Payment Method: "Sale via FetchRev"

- Non-cash equivalent payment method
- Is not added to sales subject to royalty
- Is not a third party payer

Action Items - Placing Prepaid Items on the Client's Account

1. Process the sale (prepaid massage, gift card, etc.) to the client with the payment method "Sale via FetchRev"

IICKLI	Select the SUSS for this sale	4/0/2010		Juve	FILL FILL		Constitutes	Melleses Dresses Mere
Item name			Qty	Price	Discount	Total	Services	weiness program men
X 2 Hour Massage Se	ession		1 \$	189.00	30.00%, \$56.70	\$132.30	Select Service Se	lect Service 🔻
PROMOTION CODE	Apply							
SUBTOTAL	DISCOUNT	TAX			GRAND TOTAL			
\$189.00	(\$56.70)		\$0.00		\$132.3	0		
Payment Info								Send Email Receipt?
SELECT A PAYMENT I	METHOD							
Cash Check C	C (Key/Stored) CC (Swipe) Other	Trade (se	rvices)	Account - (Upgr	ade Available)	Trade (in-house)	Sale via LocBox

Action Items – After Import of Sales and/or Refund Data

- 1. Go to the Account Details screen of the company client FetchRev
- 2. Click "Edit" of the newest "FetchRev Purchase"

Account Details - LocBox LocBox 🔽 🚺		Tools 🗸
		[Autopay Schedule Autopay History Add New Autopay Schedule]
		Date Range: O Show All Dates Select date range: Start date 46/2011 End date 46/2016
Pricing Options		Recalculate
Available for Use		
Paid Payment Ref # Description	Payment Method	Amount Scheduled Remaining Activation date Expiration Date Notes
4/6/2016 <u>1340</u> LocBox Purchase	Stripe	\$584.00 0 1/1 4/6/2016 4/6/2016 Return/Void Edit Show Visits]

- 3. Change the "Number of sessions" from 1 to 0
- 4. Click "Save"

LocBox Purchase	Payment	t Ref #1340	
Purchase date	4/6/2016		
Activation date	4/6/2016		
Expiration Date	4/6/2016		
Remaining	1		
Sale Notes			
Active	 Image: A start of the start of	HUNC	•
Number of sessions	1 3	Number of sessions	0
Activation date	4/6/2016		
Duration	1	(Days) Days 🔻	
New expiration date: 4	4/6/2016		

MINDBODY Integration Notes and FAQ

- Refunds, if applicable, should be processed directly in the FetchRev portal. Refunds processed by other methods will not be reflected in the MINDBODY site.
- The integration will not import names of purchasers into the MINDBODY site
- Will the individual transactions be imported?
 - No, one transaction will be entered to show the total of sales from the prior day and a second transaction will be entered to show all refunds from the prior day.
- Will a line item at \$0 be imported if there are no sales or refunds?
 - No, if there are zero sales or refunds nothing will be imported to the MINDBODY site.
- Will the returns in FetchRev show as a return in the MINDBODY site?
 - No, returns in MINDBODY will show as a sale for a negative amount, not as an actual return.
- Will the process for entering payments from other third party payers change to this same process?
 - No, this is a special process specific to the integration with FetchRev.

Installing the Website Plugin or Pop-up

The website plugin aka "Pop-up" allows new and old clients to purchase gift cards, offers, and claim coupons directly from your Elements Massage website. Your FetchRev team will pre-install this code prior to the launch of your first campaign.

IMPORTANT: You can turn the plugin on and off, switch campaigns, and change the look all in the FetchRev Plugin manager!

Setting up your New Client Offer

Using the FetchRev website plugin, you will be able to sell your new client offer or make it a claimable coupon directly on your website. *This has been coined as one of the best features by Element's owners.*

The website plugin is highly recommended and will allow you to get even more conversions from your organic web traffic. As a bonus, you will have a dashboard informing how many people have visited your website, how many people clicked on your new offering, and how many people claimed/purchased it to track your ROI.

Importing a New Client Trial Template

Now it is time to actually create your offer.

You can create a Buy Now or Coupon campaign from scratch. Since we work with so many Elements Massage locations, we have many templates already created that you can import into your FetchRev portal.

How do I import?

- 1. Log into FetchRev and click on the CAMPAIGN Manager screen
- There, you will see a green button that says "Create New." To the right-hand side you will see a drop down arrow (see image to the right)
 - i. Click on the Dropdown arrow to the right of Create New
 - ii. Click on "Import."
- 3. Paste any FetchRev Elements Massage campaign that follows Elements Massage brand standards or speak to FetchRev Customer Success to determine which Elements Massage campaigns will work best for your location.

FETCHREV	HOME CAMI	PAIGNS PLU	JGINS EV	/ENTS CUST	OMERS Rap	pt Admin V	REDEEM VOUCHERS
Manage Your C	ampaigns			_			Create New
Pending Approval (1)	Drafted (28)	Scheduled (0)	Active (1) Finished (3)	View	by status View by category
$\boldsymbol{\mathcal{P}}$ Search by campaign name			■ Sort: Sta	art Date 🛛 🕏	TFilter: Ca	impaign Types 🖓	Delivery Channels 👻
	Birthday Of ACTIVE Start Date: Au 4:15 PM End Date: -	ffer 19 2016,		\$ REV	25 Venue	1 claim	View Results 🗸
FETCHREV	Dashboard Campaigns	About Careers	Blog Contact	FAQ Privacy		fy	Have Questions? Give us a call at 877-394-2410.

Ready-Made New Client Trial Templates

Here is a table of the new client special Url links you can copy and paste into the import screen.

BUY NOW (purchasable)	COUPON (no money down)
-----------------------	------------------------

\$69 New Client Buy Now:	\$49 New Client Coupon:
https://app.FetchRev.com/promotions/34	https://app.FetchRev.com/coupons/3912?
063/preview	preview=true
\$59 New Client Buy Now:	\$59 New Client Coupon:
https://app.FetchRev.com/promotions/34	https://app.FetchRev.com/coupons/3910?
069	preview=true
\$49 New Client Buy Now:	\$30 Off New Client Coupon:
https://app.FetchRev.com/promotions/34	https://app.FetchRev.com/coupons/3909?
065/preview	preview=true
	\$40 Off New Client Coupon: https://app.FetchRev.com/coupons/3911? preview=true

Launching your New Client Special to your website

1. To schedule a campaign, choose Edit from the available actions



2. Click on Distribute at the top

3. Enter a start date in the future, and select whether you want the campaign to have an end date, or if it should run continuously.

> For new client trials you will want to check "Campaign has no end date"

The distribution channels 4. available for a campaign are shown in the Distribute screen.

> Click on the Website channel to turn it on

To turn On/Off a channel, click on the toggle button at the right side.

When will this campaign run? Your coupon will be claimable during these dates. We recommend that coupons run for ONE week.

Start Date:
February 6, 2015

3:00 PM

February 13, 2015	3:00 PM
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Set where and how the campaign is sent

Email	
Facebook Post	
Facebook Ads	
Twitter	
Website Plugin	

NOTE:

Channels that are On (GREEN) will be used for the campaign. Channels that are Off (GRAY) will not be used for the campaign. Channels that are Disabled are not yet properly configured to used.

Set where and how the campaign is sent

Email	
Facebook Ads	DISABLED
Facebook Post	
Twitter	
Website Plugin	
Choose an existing plugin	
Select a Plugin	

5. Select an existing plugin for the campaign to launch.

Set where and how the campaign is sent

Email			
Facebook Post			
Facebook Ads			
Twitter			
Website Plugin			
Choose an existing plug	gin		
😨 Select a Plugin	*		
Website Plugin			Remove
		Included campaigns	
		PLUGIN - \$69 Bu	y Now
	New Client Specials Starting at \$69 - Simply	Active Aug 18 20	16
	the Best Massage Guaranteed.	General Gift Carc	ds - from \$89
E A	DISCOUNT: 22% VALUE: \$89.00 SAVINGS: \$20.00	• • • O Active Aug 18 20	916
	VIEW OFFER		
Design	Distribute	Review	
Preview Sa	ave for later	Schedule Camp	baign
	L		
104 D. 2000			
Campaign Manag	er		
Drafted (1) Scheduled (1) Active (4) Finished	i (1)	
P Search by campaign name		I	Sort: Start Date
	Campaign Title Here		
	SCHEDULED		
	Start Date: Feb 06 2015, 12:00 End Date: Feb 13 2015, 12:00 P	рм м	
S COUPON			

- 5. To activate the campaign, click Review:
- 6. Then click on Schedule Campaign:
- Once your campaign is scheduled, it's status will be set to 'Scheduled'. The shortest possible time frame to get it live on your site is the nearest quarter hour. For example. If it is 2:10 the soonest it will show up on your site will be 2:15.

8 The campaign will become 'Active' once the start date has been reached.

Manage Your Campaigns



How do I know it is working or that people are using it?

Now that it is up on your site now you can sit back and go about your business. As people start seeing your new offer and claiming and purchasing you will be notified by email.

You will be able to see a list of who purchased and who claimed within FetchRev, by clicking on the Campaigns tab, and then clicking on "View Results" to the right of the active offer.



PLUGIN: \$20 Off • ACTIVE Start Date: Apr 20 2015, 8:00 PM End Date: -

\$6,201.50 637 REVENUE CLAIMS View Results 🔍

The results screen shows you an overview of how your campaign is performing on all channels (email, Facebook, website). On the left-hand side of the results screen, you can view your ROI by individual channel. Click on the image with the plug (Website Plugin) to view your website results.

\$20 OFF COUPON	COUPON PLUGIN: \$20 Off • ACTIVE Start Date: Apr 20 2015, 8:00 PM End Date: -				
Summary	WEBSITE PLUGIN CHANNEL Overall Performance				
	IMPRESSIONS	CLICKS	CLAIMS	REDEMPTIONS	
Email	8,538	875 10.2% Click Rate	635 72.6% Claim Rate	90	
~					
Facebook Ads					
f 🗖					
Facebook Post					
🛩 📟					
Twitter					
🗯					
Website Plugin					
I					
Events Banner					

From the plugin screen, you can see how many people visited your site (impressions), how many people clicked, and how many people claimed/purchased

How to redeem customers

There a few ways to redeem customers. You can use the app (install it from the Android app store), use the weblink, or search in your FetchRev portal to find the customer and clicking redeem in the campaign results.

Three ways to Launch the Redemption App:

In Your FetchRev Account	Click on Redeem Vouchers in the upper-right corner of any screen to launch the redemption app, which opens in a new window or tab.			
	LOCBOX HOME CAMPAIGNS PLUGINS EVENTS CUSTOMERS LocBox Demo Account - REDEEM VOUCHERS			
Android Devices	Click here			
Any browser	Head to redeem.FetchRev.com			

IMPORTANT: When using your browser or Android App, you must enter a 5-character code which can be found by selecting "Settings" and then "Redemption Info" from the left-side menu in yourportal.

How to Use the Redemption App:

Launch the redemption app	From inside FetchRev, Redeem.FetchRev.com, or your Android App				
To find a customer's voucher, search for the customer's information	You can search by: A Name Email Phone number Confirmation code CocBox VOUR BUSINESS NAME HERE VOUR BUSINESS NAME HERE FIND YOUR CUSTOMERS Search by email, customer name, confirmation or phone number to redeem your vouchers. [jehnsmith@gmail.com] EEARCH				
The app will show all matching customers for your search, their purchased/claimed offers, and whether they have been redeemed.	johnsmith@gmail.com SEARCH SEARCH RESULTS FOR "johnsmith@gmail.com" John Smith Gmail.com Johnsmith@gmail.com 415-867-5309 PURCHASES & CLAIMS (2) Image: Click to redeem voucher Five 10 Minute Races CONF. #: 3044524112345 REDEEM Five 10 Minute Races CONF. #: 3044524123456 REDEEM				
You may click UNREDEEM if you accidentally redeem the wrong voucher code.					

Why Redeem Vouchers?

- Prevent reuse of the same voucher code multiple times
 Get a more accurate report of the performance of your campaigns track your ROI!

Even if you <u>use your own voucher codes in FetchRev campaigns</u>, we still recommend to mark offers as redeemed to ensure that your reputation campaigns will be sent and your data is as accurate as possible.

Importing your client list

FetchRev will automatically import your client name and email addresses from MINDBODY on a weekly basis. Anyone who is UNSUBSCRIBED in MINDBODY will be unsubscribed in FetchRev on the next sync (this syncs only one way from MB to FetchRev).

However, sometimes you may want to create custom lists, which you can upload manually through a csv file.

Uploading lists manually is a great way to separate out your members lists, associate members lists, or emails for winback campaigns.

To import a list of customers:

- 1. Click on Customers tab in the top navigation.
- 2. Click on the drop-down arrow to the right of "Add Customers" in the top right corner.
- 3. In the drop down menu, click on "Import Customers"



- 4. Select a CSV file from your computer. If you would like to add the customers to a specific list, select the list from a drop-down menu or create a new list. If you do not add the emails to a list, the emails will be added to the general list.
- 5. If your data contained a header row with the names of the fields, then FetchRev will attempt to map the columns in your data to fields within a FetchRev customer record. If your data does not contain a data row, you must map the columns in your data to fields in a FetchRev customer record (name, email, birthday, etc.). In the next screen, view and change the mapping of customer data fields, then click

Import Now to complete the import.

FETCHREV	HOME	CAMPAIGNS	PLUGINS	EVENTS	CUSTOMERS	Raptors and Puppies	Admin View	REDEEM VOUCHE
		Almost di that we in nothing m Is the first ® Yes (he	one. Select the type nport your informa natches. arow of the file just aders won't be imp	il Add e of information tion correctly. In headers? ported)	TESSES I that represents each 's okay to leave a drop	set of rows. This ensures down unselected if		
				(Showing the firs	t few rows of your file)			
		1. Fi 2. HI	rst name EATHER		First Name	\$		
		3. JA 4. De	NINE eepak					
		1. La	ast name					
		2. BF 3. At	ROWN		Last Name	\$		
		4. Ak	obhi					
		1. Er	nail address - hon	ne				
		2. he	eatherbrown1985	@gmail.com	Email	\$		
		3. JA	NINE.ANBINDER@	GMAIL.COM				

Once the upload is complete, you will receive an email notification with a summary of the results. You can also check on the results of an import by clicking on the drop-down arrow to the right of "Add Customers" and then clicking on "Import History."

Refunding a Client Purchase

If a client calls and needs a refund for a purchase they've made, you can refund them in your FetchRev portal.

First, go to your Customers tab, then search the client name via name, email address, or voucher number used for the purchase. Second, click on the customer name.

On the right hand side, you'll see the client information:



Click on the blue box that shows what the customer purchased and you'll see this screen:

PURCHASE DETA	ILS	
	Buy Now Go for Glory with a \$25, \$50 or \$100 DKC Gift Card Feb 18, 2016	
PURCHASED	\$100 Gift Card – Dallas Karting Complex	
PURCHASED ON	12/25/2015 12:32:PM	
PURCHASER	Sharon Sanford	
	Resend Purchase Confirmation	
GIFT RECIPIENT	Nick Claustre	
	p.com Resend Gift Confirmation	
OFFER CODE	3044-8215-4226-9	
PRICE	\$100	
OUANTITY	1	

Click the red refund button.

Once you click Refund, a dialog box will pop open confirming that you want the refund to go through. Click "Okay."

Customers	
	app.locbox.com says: Are you sure you want to refund this item? This action cannot be reversed.
	Cancel OK

The offer can not be refunded if it's been marked as redeemed.

Once you refund a customer in FetchRev, this action cannot be reversed. The funds will return to your customer's account in 4-10 business days.

The refund will automatically be processed to your MB account.

Further Resources to get you Started:

Elements Massage best practices FetchRev Frequently Asked Questions Elements Massage Campaign Conversion Rates