



TAO OF SHOP  
WAY OF OMNI-CHANNEL RETAIL

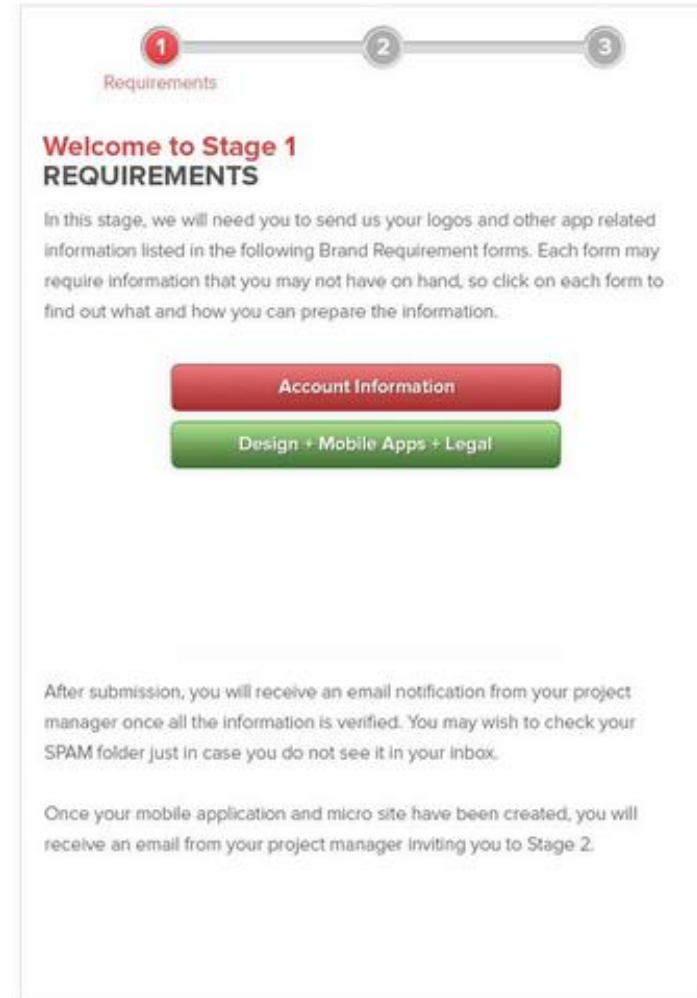
## ENGAGE PACK – USER GUIDE

# SECTION 1 : GETTING STARTED

How to set up your account for the first time



# GETTING STARTED > STAGE 1 REQUIREMENTS



1 Requirements 2 3

## Welcome to Stage 1 REQUIREMENTS

In this stage, we will need you to send us your logos and other app related information listed in the following Brand Requirement forms. Each form may require information that you may not have on hand, so click on each form to find out what and how you can prepare the information.

Account Information

Design + Mobile Apps + Legal


After submission, you will receive an email notification from your project manager once all the information is verified. You may wish to check your SPAM folder just in case you do not see it in your inbox.

Once your mobile application and micro site have been created, you will receive an email from your project manager inviting you to Stage 2.

If this is your first time accessing your Tao Of Shop dashboard, you will be taken through a quick intro, namely the 3 stages of your Tao Of Shop project. After the intro, this will be the first stage you will arrive at - The Brand Requirements gathering stage. Click on each colored option bar to open up the webform/s for your file submission.



# GETTING STARTED > STAGE 2 REVIEW



**1** Requirements      **2** Review      **3**

## Welcome to Stage 2 REVIEW

1. Do note that you would have received your Android application files and micro site link from your project manager. If not, please check your SPAM email folder.
2. Next, click on 'Tour' to start learning how to use the dashboard features. Individual tours for each feature of the dashboard can be activated at anytime.
3. Start creating and publishing TEST content so that you can view it through the mobile application and micro site.
4. Next, click [here](#) to download the checklist and go through it to ensure you are able to use all the features.
5. If you have any feedback, indicate it on the checklist and send it to us using this [form](#).


Click on the Stage 2 icon to return to this page anytime.

Once you have submitted the required files to your Project Manager, you will be activated to Stage 2 of the project. By this stage, you will have your mobile app sent to you and ready for your review. Follow the steps as indicated on this page to complete your app REVIEW



**TAO OF SHOP**  
WAY OF OMNI-CHANNEL RETAIL

# GETTING STARTED > STAGE 3 GO LIVE



**Welcome to Stage 3**  
**LET'S GO LIVE!**

Your project is now ready to Go Live!

Please click [here](#) to send us your approval and select an available Go Live! date.

Month

Date

**SUBMIT**

Please choose a date at least 7 days prior to your actual launch date. You may wish to continue using the dashboard to create more content OR plan your marketing content for roll out.

Once you approve your app at Stage 2, your project manager will activate Stage 3 of your project . This is when your project is ready to Go Live. You will be selecting an available date on this page. Before your launch date, ensure that your team is actively creating content and marketing collaterals.



**TAO OF SHOP**  
WAY OF OMNI-CHANNEL RETAIL

## SECTION 2 : YOUR NEWSFEED

This is your content repository - where you can view, edit your posts, coupons that you have already created


The screenshot shows the admin dashboard for TAO OF SHOP. At the top right, there is a navigation bar with the email 'admin@soleshiok.com', 'Brand Admin', and tabs for 'Logout', 'Tour', and 'Support'. The main header features the TAO OF SHOP logo, which includes a shopping bag icon with the Chinese character '道' (dao) and the text 'TAO OF SHOP WAY OF OMNI-CHANNEL RETAIL'. On the left side, there is a vertical sidebar menu with the following items: 'News Feed' (highlighted in pink), 'Engage', 'Sell', 'Rewards', 'Insights', 'Settings', and 'System Message'. The main content area displays a progress indicator with three steps: '1 Requirements', '2 Review', and '3 Go Live'. Below this, there are search and filter options: a 'Filter:' dropdown set to 'Posts', 'from' and 'to' date input fields with an 'Update' button, and a 'keyword search' input field with a 'Search' button. The main post is titled 'Ladies, Winter Is Approaching.' in pink text, dated 'Thu, September 11, 2014, 09:50:05'. The post content reads: 'Winter is coming.. Are you ready to brace the blustery, chilling subzero winds...?'. Below the text is a photograph of four different styles of winter boots: a brown leather boot, a dark brown boot, a white boot, and a black boot.

Once you log in to your admin dashboard , the Newsfeed will be the default view. It is a repository of your created content. Before we come to that, let's look at the available modules. Click on the Tour tab found on the top right corner to activate the page tour

The screenshot displays the TAO OF SHOP admin dashboard. At the top right, the user is logged in as 'admin@soleshiok.com | Brand Admin' with buttons for 'Logout', 'Tour', and 'Support'. The main header features the TAO OF SHOP logo and the tagline 'WAY OF OMNI-CHANNEL RETAIL'. On the left, a side navigation panel lists modules: News Feed (highlighted), Engage, Sell, Rewards, Insights, Settings, and System Message. A central pop-up window titled 'Home or News Feed' provides instructions: 'On the side navigation panel, you will find your 4 main modules & settings. Click NEXT to get a snapshot of each module function.' Below this are 'Previous' and 'Next' buttons. To the right, an 'ENGAGEMENTS' summary table shows 'Current Month's Usage' and 'Current Month's Balance' as 0, with a 'Top-up Balance' of 0 and a 'REFRESH' button. Below the table are date range selection fields ('from' to 'to') with an 'Update' button, and a 'keyword search' field with a 'Search' button. The main content area shows a news feed item titled 'Boots + Heels + Shoes = ?' dated 'Fri, October 24, 2014, 02:32:52' with the text 'That's right. you got it! WEDGE!' and a definition: 'DEFINITION: Wedge boots, wedgies or lifties are shoes and boots with a sole in the form of a wedge so that one piece of material, normally rubber, serves as both the sole and the heel.'

The side navigation panel offers a quick access to each of the main modules. If you are under the ENGAGE/ ENGAGE PLUS pack, the SELL module will be unavailable. To upgrade, please contact SingTel sales








admin@soleshiok.com | Brand Admin Logout



## TAO OF SHOP

WAY OF OMNI-CHANNEL RETAIL

ENGAGEMENT	
Current Month	0
Current Month's Balance	0
REFRESH	

-  News Feed
-  Engage
-  Sell
-  Rewards
-  Insights
-  Settings
-  System Message

### Engage

Create content, messages and coupons

[Previous](#) [Next](#)

from  to:

## Boots + Heels + Shoes = ?

Fri, October 24, 2014, 02:32:52

That's right. you got it! WEDGE!

DEFINITION: Wedge boots, wedgies or lifties are shoes and boots with a sole in the form of a wedge shaped piece of material, normally rubber, serves as both the sole and the heel.

Introducing you F21 latest heels!



**TAO OF SHOP**  
WAY OF OMNI-CHANNEL RETAIL

ENGAGEMENTS	
Current Month's Usage	
0	
Current Month's Balance	Top-up Balance
0	0
REFRESH	

- News Feed
- Engage
- Sell
- Rewards
- Insights
- Settings
- System Message

Filter:  from  to:  [Update](#)

[Search](#)

## Rewards

Manage Rewards and Redemption

[Previous](#) [Next](#)

That's right. you got it! WEDGE!

DEFINITION: Wedge boots, wedgies or lifties are shoes and boots with a sole in the form of a wedge so that one piece of material, normally rubber, serves as both the sole and the heel.

Introducing you F21 latest heels!

You know what they say.. about heels for ladies..  
Be it, High Heels, Wedgies, Boots with heels..



**TAO OF SHOP**  
WAY OF OMNI-CHANNEL RETAIL

# NEWSFEED

The screenshot shows the TAO OF SHOP admin dashboard. At the top right, the user is logged in as 'admin@soleshiok.com | Brand Admin' with buttons for 'Logout', 'Tour', and 'Su'. The dashboard header includes the TAO OF SHOP logo and tagline 'WAY OF OMNI-CHANNEL RETAIL'. On the left is a navigation menu with options: News Feed (highlighted), Engage, Sell, Rewards, Insights, Settings, and System Message. On the right, there is an 'ENGAGEMENTS' summary table:

ENGAGEMENTS	
Current Month's Usage	
0	
Current Month's Balance	Top-up Balance
0	0
REFRESH	

Below the navigation menu, there are filters for 'Filter: Posts', 'from', 'to', and 'keyword search'. A modal window titled 'Insights Heels + Shoes = ?' is overlaid on the content, with a 'View Analytics' link and 'Previous' and 'Next' buttons. The main content area displays a definition of wedge boots and an introduction to F21 latest heels.

DEFINITION: Wedge boots, wedgies or lifties are shoes and boots with a sole in the form of a wedge so that one piece of material, normally rubber, serves as both the sole and the heel.

Introducing you F21 latest heels!

You know what they say.. about heels for ladies..  
Be it, High Heels, Wedgies, Boots with heels..

"To wear dreams on one's feet is to begin to give reality to one's dreams." - Roger Vivier

- An overview of Insights data is offered to all our pack subscribers.
- A detailed insights data breakdown is only available to Retail packs.



# TAO OF SHOP

WAY OF OMNI-CHANNEL RETAIL

ENGAGEMENTS	
Current Month's Usage	
0	
Current Month's Balance	Top-up Balance
0	0
REFRESH	

- News Feed
- Engage
- Sell
- Rewards
- Insights
- Settings
- System Message

Filter: Posts

from to to [Update](#)

keyword search [Search](#)

## Boots + Heels + Shoes = ?

### Settings

Reset your account password and view Account Activity details

[Previous](#)

[Next](#)

wedgies or lifties are shoes and boots with a sole in the form of a wedge so that one rubber serves as both the sole and the heel.

Introducing you F21 latest heels!

You know what they say.. about heels for ladies..

Be it, High Heels, Wedgies, Boots with heels..



# TAO OF SHOP

WAY OF OMNI-CHANNEL RETAIL

The screenshot displays the TAO OF SHOP admin dashboard. At the top right, the user is logged in as 'admin@soleshiok.com | Brand Admin' with options for 'Logout', 'Tour', and 'Support'. The main header features the TAO OF SHOP logo and the tagline 'WAY OF OMNI-CHANNEL RETAIL'. A left sidebar contains navigation items: News Feed (highlighted), Engage, Sell, Rewards, Insights, Settings, and System Message. A central notification box titled 'Engagement Counter' explains that the counter shows monthly usage and balance in real time. It notes that an 'Unlimited' balance indicates an unlimited engagements pack until the next contract renewal. Below the notification are 'Previous' and 'Next' buttons. To the right, an 'ENGAGEMENTS' summary table shows 'Current Month's Usage' at 0, 'Current Month's Balance' at 0, and 'Top-up Balance' at 0, with a 'REFRESH' button. Below the notification, a news feed post is visible with the title 'Boots + Heels + Shoes = ?', dated 'Fri, October 24, 2014, 02:32:52'. The post content includes 'That's right. you got it! WEDGE!' and a definition of wedge boots/wedges. A search bar and a 'Filter: Posts' dropdown are also visible.

admin@soleshiok.com | Brand Admin Logout Tour Support

**ENGAGEMENTS**  
Current Month's Usage: 0  
Current Month's Balance: 0  
Top-up Balance: 0  
REFRESH

**Engagement Counter**  
Your ENGAGEMENT counter displays your monthly usage and balance in real time.

If your balance is indicated as Unlimited, this means that you are on a Unlimited Engagements Pack, until your next contract renewal or further notice.

Filter: Posts

Previous Next

**Boots + Heels + Shoes = ?**  
Fri, October 24, 2014, 02:32:52  
That's right. you got it! WEDGE!  
DEFINITION: Wedge boots, wedgies or lifties are shoes and boots with a sole in the form of a wedge so that one piece of material, normally rubber, serves as both the sole and the heel.  
Introducing you F21 latest heels!

- Engagements are defined as : Coupon downloads, click to view private posts, in-store check-in, earning and redemption of rewards

# NEWSFEED

admin@soleshiok.com | Brand Admin | Logout | Tour | Support

**ENGAGEMENTS**  
Current Month's Usage: 0  
Current Month's Balance: 0 | Top-up Balance: 0  
REFRESH

**News Feed**  
Engage  
Sell  
Rewards  
Insights  
Settings  
System Message

Filter: Posts from to: to Update  
keyword search Search

For a more detailed statement, check under Settings > Account Activity.

**Boot Wedges = ?**  
Fri, October 24, 2014, 02:32:52  
That's right. you got it! WEDGE!  
DEFINITION: Wedge boots, wedgies or lifties are shoes and boots with a sole in the form of a wedge so that one piece of material, normally rubber, serves as both the sole and the heel.  
Introducing you F21 latest heels!

Previous Next

- Let's take a quick look at the other features on your Newsfeed before we go into detail for your Engage, Rewards and Insights module.



The screenshot shows a mobile application interface for a 'News Feed'. On the left is a vertical navigation menu with items: News Feed (highlighted in pink), Engage, Sell, Rewards, Insights, Settings, and System Message. The main content area features a 'Filter:' dropdown menu currently set to 'Posts'. A tooltip box titled 'Filter Drop Down' is overlaid on the dropdown, explaining that the Newsfeed is a repository of created content and can be filtered to view Posts, Photo Posts, Coupons, and Private Posts. The tooltip includes 'Previous' and 'Next' navigation buttons. Below the filter are search fields for 'from' and 'to' (with an 'Update' button), and a 'keyword search' field (with a 'Search' button). The main content area displays a post titled 'Boots' with a date 'Fri, October', a 'Previous' button, and the text 'That's right. you got it! WEDGE!'. Below this is a 'DEFINITION: Wedge boots, wedgies or lifties are shoes and boots with a sole in the form of a wedge so that one piece of material, normally rubber, serves as both the sole and the heel.' followed by 'Introducing you F21 latest heels!', 'You know what they say.. about heels for ladies.. Be it, High Heels, Wedgies, Boots with heels..', and a quote: 'To wear dreams on one's feet is to begin to give reality to one's dreams.' - Roger Vivier. At the bottom of the post is a row of four images of different styles of high-heeled shoes.

- Note : Private Posts available to ENGAGE Premium and all RETAIL packs.

The screenshot shows a news feed interface. On the left is a vertical navigation menu with items: News Feed (highlighted in pink), Engage, Sell, Rewards, Insights, Settings, and System Message. The main content area has a filter bar at the top with a dropdown menu set to 'Posts', 'from' and 'to' input fields, and 'Update' and 'Search' buttons. A black tooltip box is overlaid on the 'from' field, containing the text: 'Start of Range Filter', 'You can also filter according to a specific date range. Enter the Start Date via a pop out calendar', and two blue buttons labeled 'Previous' and 'Next'. Below the filter bar, a post is visible with the title 'Boots + Heels + Shoes =', a timestamp 'Fri, October 24, 2014, 02:32:52', and the text 'That's right, you got it! WEDGE!'. The post includes a definition of wedge shoes, an introduction to 'F21 latest heels!', a quote about heels for ladies, and a quote by Roger Vivier. At the bottom of the post is an image of three different styles of high-heeled shoes.

- Tip : Once you've selected the Start and End date, remember to click ' Update'.

The screenshot shows a mobile application interface with a sidebar menu on the left containing: News Feed (highlighted), Engage, Sell, Rewards, Insights, Settings, and System Message. The main content area displays a post titled "Boots + Heels + Shoes = ?" dated "Fri, October 24, 2014, 02:32:52". The post text includes: "That's right. you got it! WEDGE!", "DEFINITION: Wedge boots, wedgies or lifties are shoes and boots with a sole in the form of a wedge so that one piece of material, normally rubber, serves as both the sole and the heel.", "Introducing you F21 latest heels!", "You know what they say.. about heels for ladies.. Be it, High Heels, Wedgies, Boots with heels..", and a quote: "To wear dreams on one's feet is to begin to give reality to one's dreams." - Roger Vivier. Below the text is a row of six images of various wedge-heeled shoes. At the top of the main content area, there is a filter section with a dropdown menu set to "Posts", and input fields for "from" and "to" dates, with an "Update" button. A search bar with "keyword se" and "Search" is also visible. A black overlay box with white text reads: "End of Range Filter followed by End Date, then click Update". Below this text are two blue buttons labeled "Previous" and "Next".

- Note : A wider date range will take a longer time for the page to load as the system is combing through tons of data!

The screenshot shows a newsfeed interface. On the left is a sidebar with navigation options: News Feed (highlighted), Engage, Sell, Rewards, Insights, Settings, and System Message. The main content area features a post titled "Boots + Heels + Shoes = ?" dated "Fri, October 24, 2014, 02:32:52". The post text includes "That's right, you got it! WEDGE!", a definition of wedge boots, and an introduction to "F21 latest heels!". A quote by Roger Vivier is also present. At the bottom of the post is an image of three pairs of wedge sandals. Above the post, there are filter and search controls: a "Filter:" dropdown set to "Posts", "from:" and "to:" input fields, an "Update" button, a "keyword search" input field, and a "Search" button. A dark tooltip box titled "Keyword Search" is overlaid on the right, explaining that keyword search pulls content based on the filter type and providing an example for searching for coupons with the keyword 'festive'.

- Tip : Always check that your Filter type ( Post, Photo post, Coupon etc.) is selected first



The screenshot shows the TAO OF SHOP admin dashboard. At the top right, there is a user profile for 'admin@soleshiok.com | Brand Admin' with links for 'Logout', 'Tour', and 'Support'. The main header features the TAO OF SHOP logo and the tagline 'WAY OF OMNI-CHANNEL RETAIL'. On the left, a navigation menu includes 'News Feed', 'Engage', 'Sell', 'Rewards', 'Insights', 'Settings', and 'System Message'. On the right, there is a summary table for 'ENGAGEMENTS' showing 'Current Month's Usage' and 'Current Month's Balance' both at 0, with a 'Top-up Balance' also at 0 and a 'REFRESH' button below. A central tooltip titled 'Starting with Engage' is displayed, containing the text: 'Let's get down in detail with each module, starting with ENGAGE. We'll learn how to create a new post, photo post and coupon for your brand. Click ENGAGE > POST and start the page tour.' Below the text are two buttons: 'Previous' and 'Start with Engage'. The background shows a 'Filter:' section and a 'Boots with Wedge Heels?' article snippet.

ENGAGEMENTS	
Current Month's Usage	
0	
Current Month's Balance	Top-up Balance
0	0
REFRESH	

- Each page comes with an individual Tour. When you're ready to start with any of the modules listed in the side navigation, click on the module name and scroll to the desired submodule. E.g. ENGAGE > NEW POST

## SECTION 2 : ENGAGE FEATURES

How to create, edit, delete posts and coupons

# ENGAGE > NEW POST



**TAO OF SHOP**  
WAY OF OMNI-CHANNEL RETAIL

ENGAGEMENTS	
Current Month's Usage	
0	
Current Month's Balance	Top-up Balance
0	0
REFRESH	

- News Feed
- Engage**
- ▶ New Post
- ▶ New Photo(s)
- ▶ New Coupon
- Sell
- Rewards
- Insights
- Settings
- System Message

Filter: Posts from to: to [Update](#)

keyword search [Search](#)

## Boots + Heels + Shoes = ?

Fri, October 24, 2014, 02:32:52

That's right. you got it! WEDGE!

DEFINITION: Wedge boots, wedgies or lifties are shoes and boots with a sole in the form of a wedge so that one piece of material, normally rubber, serves as both the sole and the heel.

Introducing you F21 latest heels!

- From the side navigation, click on ENGAGE > New Post to load the page



**TAO OF SHOP**  
WAY OF OMNI-CHANNEL RETAIL

ENGAGEMENTS	
Current Month's Usage	
0	
Current Month's Balance	Top-up Ba
0	0
REFRESH	

- News Feed
- Engage**
- New Post
- New Photo(s)
- New Coupon
- Sell
- Rewards
- Insights
- Settings
- System Message

## New Post

### Add Headers

30 characters left

### Post Type:

- Image Post
- Product Post
- External URL Post
- Video(Youtube) Post

### Select image file:

No file chosen

### Add Text

- Once the page loads, activate your page Tour. ( top right corner of your dashboard)



**TAO OF SHOP**  
WAY OF OMNI-CHANNEL RETAIL

# ENGAGE > NEW POST

admin@soleshiok.com | Brand Admin | Logout | Tour | Support

TAO OF SHOP  
WAY OF OMNI-CHANNEL RETAIL

ENGAGEMENTS

Current Month's Usage	
0	
Current Month's Balance	Top-up Balance
0	0

REFRESH

News Feed

Engage

New Post

New Photo(s)

New Coupon

Sell

Rewards

Insights

Settings

System Message

## New Post

Add Headers

30 characters left

Post Type:

- Image Post
- Product Post
- External URL Post
- Video(Youtube) Post

Select image file:

Choose File No file chosen

Add Text

### New Post

There are 4 options within a post:

- Image
- Product link **available only in Retail pack**
- External link
- Youtube video link

Before you create your first post, do note that if you wish to embed a coupon, you need to create it first. Alternatively, you can save this post as a draft, create the coupon and return to embed it in.

Next

- When the Tour start, you can then see the pop out messages appearing next to the relevant features. You can click NEXT to go to the next pop out, or PREVIOUS to revisit any of the last pop outs.

# ENGAGE > NEW POST



**TAO OF SHOP**  
WAY OF OMNI-CHANNEL RETAIL

ENGAGEMENTS	
Current Month's Usage	
0	
Current Month's Balance	Top-up Balance
0	0
REFRESH	

- News Feed
- Engage**
- New Post
- New Photo(s)
- New Coupon
- Sell
- Rewards
- Insights
- Settings
- System Message

## New Post

Add Headers

30 characters left

Post Type:

- Image Post
- Product Post
- External URL Post
- Video(Youtube) Post

Select image file:

No file chosen

### Post Title

Enter your header/title, up to 30 characters

Previous

Next

- Note : If you notice any greyed out features, this means that they are unavailable in your current pack.



**TAO OF SHOP**  
WAY OF OMNI-CHANNEL RETAIL

# ENGAGE > NEW POST

The screenshot displays the 'TAO OF SHOP' admin dashboard. At the top right, the user is logged in as 'admin@soleshiok.com | Brand Admin' with options for 'Logout', 'Tour', and 'Support'. The dashboard includes a navigation sidebar on the left with options like 'News Feed', 'Engage', 'New Post', 'New Photo(s)', 'New Coupon', 'Sell', 'Rewards', 'Insights', 'Settings', and 'System Message'. The main content area is titled 'New Post' and features a text input field for headers, a character count of '30 characters left', and a 'Post Type' section with radio buttons for 'Image Post' (selected), 'Video Post', and 'Text Post'. A tooltip is overlaid on the 'Image Post' option, stating: 'Image Post. If you wish to insert an image, leave this checked.' with 'Previous' and 'Next' navigation buttons. In the top right corner, there is an 'ENGAGEMENTS' summary table:

ENGAGEMENTS	
Current Month's Usage	
0	
Current Month's Balance	Top-up Balance
0	0
REFRESH	

- Note : You can select 1 out of the 3 post options. Once published, this post will be saved under the selected post option permanently. While you can make edits, it would be edited under the selected post option. For example, if you publish this post as a video post, you are not able to edit it to an image post later on.

# ENGAGE > NEW POST

News Feed

Engage

New Post

New Photo(s)

New Coupon

Sell

Rewards

Insights

Settings

System Message

## New Post

Add Headers

30 characters left

Post Type:

- Image Post
- Product Post
- External URL Post
- Video(Youtube) Post

Select image file:

Choose File No file chosen

Select an image file saved in your computer. The ideal dimension is a 1:1 ratio, 500x500 px and above with a maximum file size of 2mb.

Previous Next

Add Coupon

No Coupon

- Tip : The background color of your image should be standardized, preferably a clean white, neutral color.



# ENGAGE > NEW POST

**News Feed**

**Engage**

New Post

New Photo(s)

New Coupon

Sell

Rewards

Insights

Settings

System Message

## New Post

Add Headers

30 characters left

Post Type:

- Image Post
- Product Post
- External URL Post

### Product Post

Or check this if you wish to embed a call-to-action button that would bring users to a specific eShop product you're promoting in this post. Click to insert the product link. (this feature is available for all RETAIL packs)

Previous Next

- Note : This feature is available for Retail packs

# ENGAGE > NEW POST

News Feed

Engage

New Post

New Photo(s)

New Coupon

Sell

Rewards

Insights

Settings

System Message

REFRESH

## New Post

Add Headers

30 characters left

Post Type:

- Image Post
- Product Post
- External URL Post
- Video (Youtube) Post

**External URL Post**

You can also insert an image with call-to-action button that would bring users to a specific external link.

Previous Next

- Note : From time to time, always check that the external link is working

# ENGAGE > NEW POST

**Engage**

- New Post
- New Photo(s)
- New Coupon

**Sell**

- Rewards
- Insights
- Settings
- System Message

## New Post

**Add Headers**

30 characters left

**Post Type:**

- Image Post
- Product Post
- External URL Post
- Video(Youtube) Post

**Video(Youtube) Post**  
Or embed a Youtube video

[Previous](#) [Next](#)

**Add Coupon**

No Coupon

- Tip : Check that the video settings is set for public viewing

# ENGAGE > NEW POST

News Feed

Engage

New Post

New Photo(s)

New Coupon

Sell

Rewards

Insights

Settings

System Message

## New Post

Add Headers

30 characters left

Post Type:

- Image Post
- Product Post
- External URL Post
- Video(Youtube) Post

Select image file:

Choose File No file chosen

Add Text

Add Coupon

No Coupon

### Post Description

Next, fill in the description, up to 2000 characters including spaces.

Previous Next

- Tip : Once you start inputting content in this field, there would be a character counter to help ensure that you're within the character limitation.



# ENGAGE > NEW POST

The screenshot shows the 'ENGAGE > NEW POST' interface. On the left, there is a dark sidebar with 'Settings' (gear icon) and 'System Message' (envelope icon). The main content area is light gray and contains the following sections:

- Select image file:** A 'Choose File' button and the text 'No file chosen'.
- Add Text:** A large, empty text input box.
- Add Coupon:** A dropdown menu currently showing 'No Coupon'.
- Type of Post:** Two dropdown menus, the first showing 'Public Post' and the second showing 'Post Now'.
- At the bottom, there are two checkboxes: 'Post to Facebook' and 'Post to Twitter', both of which are unchecked.

A black tooltip box with a close button (x) is overlaid on the 'Add Coupon' dropdown. The tooltip contains the following text:

**Add Coupon**  
Coupons are pre-created. If you have no coupons at this stage, leave this option under 'No Coupon'. You can always save your post as a draft and come back when your coupon is ready

At the bottom of the tooltip are two blue buttons: 'Previous' and 'Next'.

- Engage and Engage Plus packs : coupons can be set for usage In-store.
- Engage Premium & all Retail packs : coupons can be set for usage In-store, Online, Both. Click to find out the [preferred flow for coupon creation](#)



**TAO OF SHOP**  
WAY OF OMNI-CHANNEL RETAIL

# ENGAGE > NEW POST

Start Tour

End Tour

## Add Coupon

No Coupon

## Type of Post

Public Post

Post Now

Post to Facebook

Post to Twitter

Save

Publish

## Post Type

Select to publish your post as a **Public** or **Private Post**. Use the **Private Post** function when you wish to send private messages based on Consumers' actions or to a selected consumer database.

**NOTE: Private Post is not available for ENGAGE & ENGAGE Plus packs)**

Previous

Next

EDIT DELET

- Note : This feature is available for Engage Premium & all Retail packs



**TAO OF SHOP**  
WAY OF OMNI-CHANNEL RETAIL

**Social Media**

You also have the option to publish to your Facebook and Twitter pages simultaneously by marking the checkbox. (this feature is available for all RETAIL packs) This is possible if you'd provided us access to facilitate the linking to your social media account/s.

**\*Facebook publishing:** Posts published from your Tao Of Shop dashboard would be consolidated under a Facebook album titled '**Tao Of Shop posts**'. Do not edit the name nor delete the album as this would affect your posts display and data tracking.

[Previous](#) [Next](#)

**Type of Post**

Public Post ▼

Post Now ▼

Post to Facebook

Post to Twitter

[Save](#) [Publish](#)

- Note : The publishing to Facebook and Twitter is only available for all Retail packs. For Engage and Engage Plus users, please contact the sales team to purchase this as an add-on.

# ENGAGE > NEW POST

Add Text

Add Coupon

No Coupon

Type of Post

**Save**  
'SAVE' option will save your post as a draft.

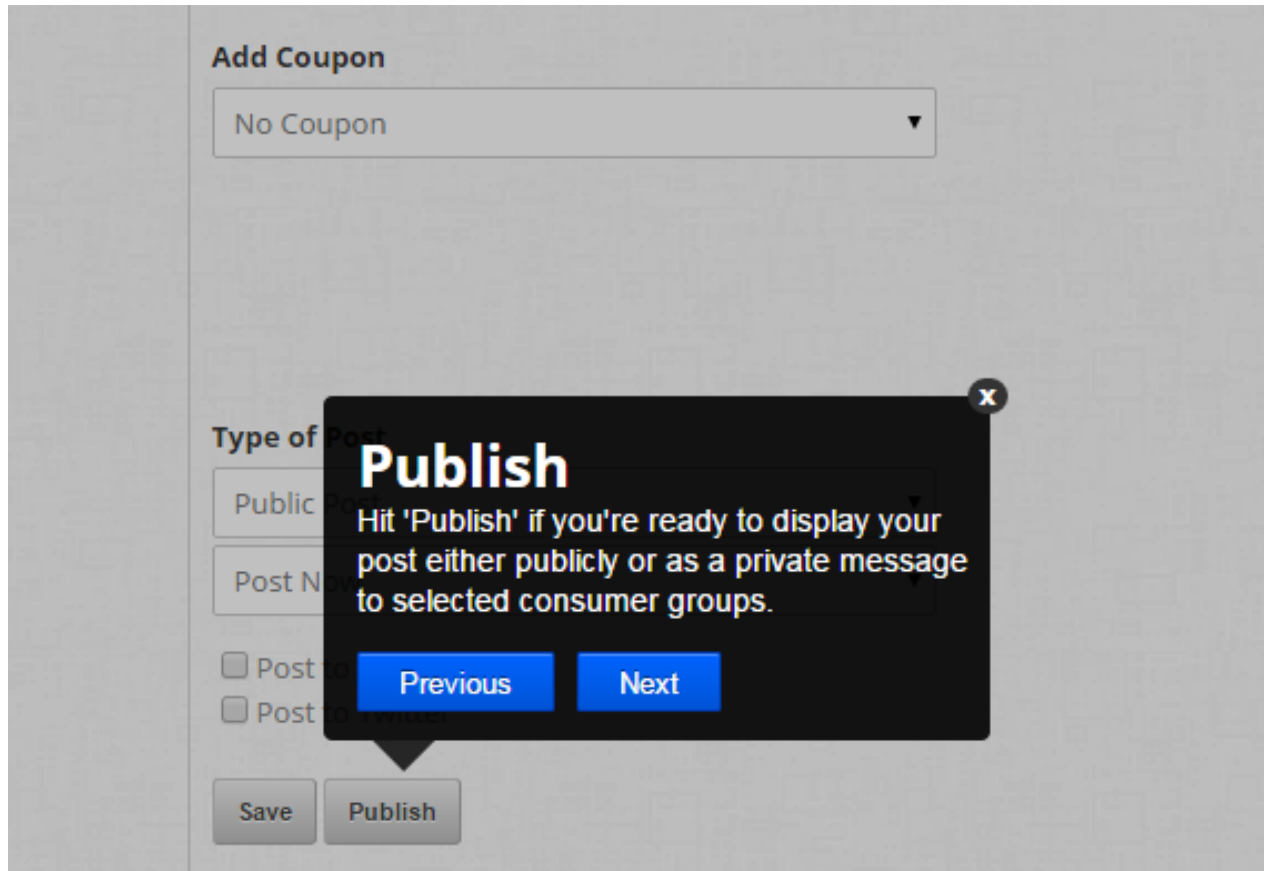
Previous Next

Save Publish

- Tip : If you need to embed a coupon and need time to create that, you should then save this post as a draft first , create your coupon and return to embed it in. Your post will can be found in the post listing at the bottom of the page with its status displayed as ' DRAFT'



# ENGAGE > NEW POST



- Tip : Accidentally published a post to your app? Clicking on the SAVE option will hide its visibility on your consumer apps.
- Let's now move on to New Photo Post once you're familiar with creating a New Post.



# ENGAGE > NEW PHOTO POST

**Engage**

- News Feed
- Engage**
- New Post
- New Photo(s)
- New Coupon
- Sell
- Rewards
- Insights
- Settings
- System Message

## New Photo Post

Add Headers

URL (for url photo posts):

30 characters left

Choose File No file chosen

Choose File No file chosen

Choose File No file chosen

Choose File No file chosen

Choose File No file chosen

Choose File No file chosen

Add Text

### Photo Post

If you would like to post an image gallery, try the photo post option. You can upload up to 6 images with an optional external link.

[Next](#)

Note : Creating a Photo Post is similar to that of a New Post. The 2 options are :

- The ability to attach multiple images, forming a gallery
- The ability to embed an external link

## New Photo Post

**Add Headers**

**URL** (for url photo posts):

30 characters left

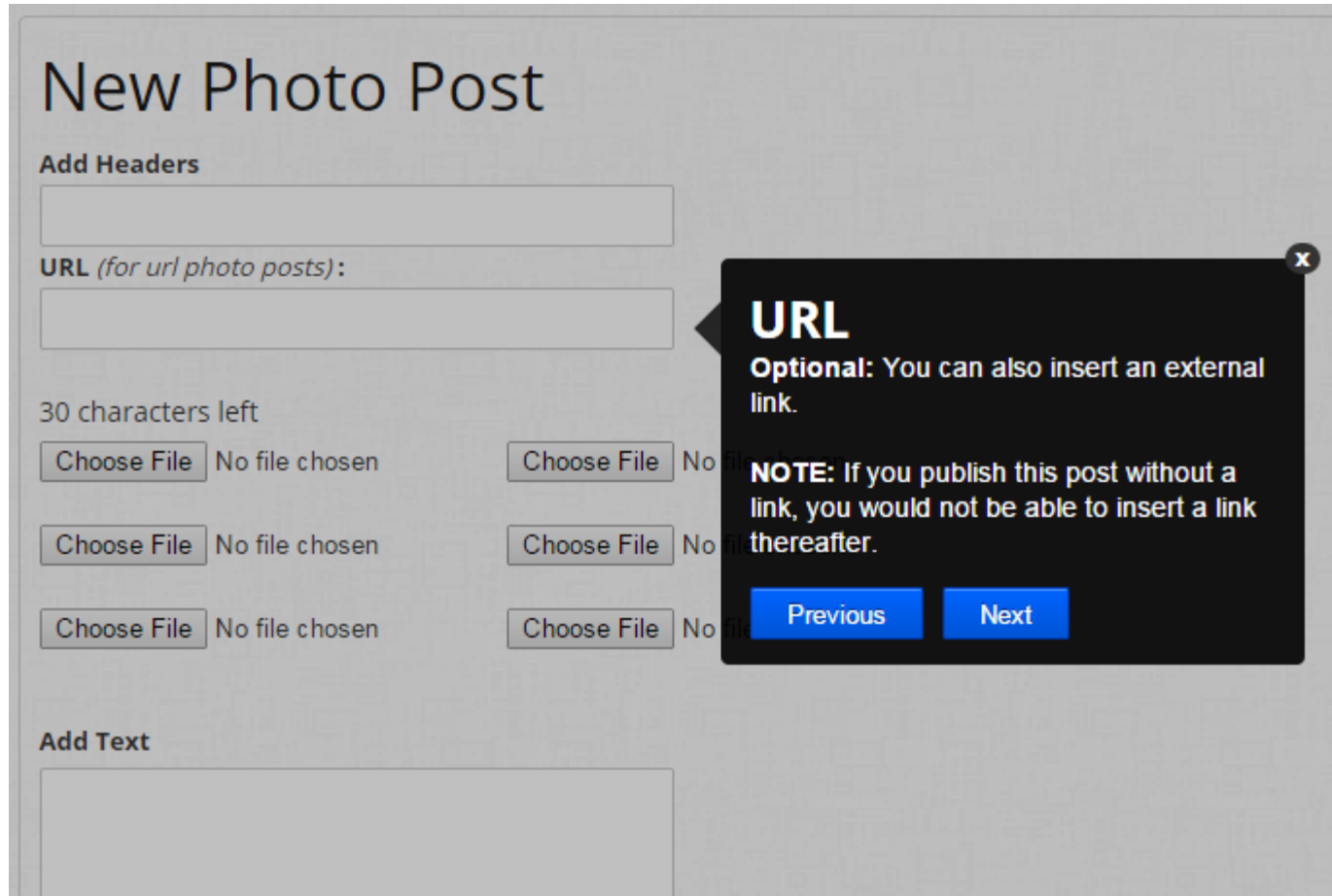
<input type="button" value="Choose File"/> No file chosen	<input type="button" value="Choose File"/> No file chosen
<input type="button" value="Choose File"/> No file chosen	<input type="button" value="Choose File"/> No file chosen
<input type="button" value="Choose File"/> No file chosen	<input type="button" value="Choose File"/> No file chosen

**Add Text**

**New Photo Post**  
Enter your header/title, up to 30 characters

[Previous](#) [Next](#)

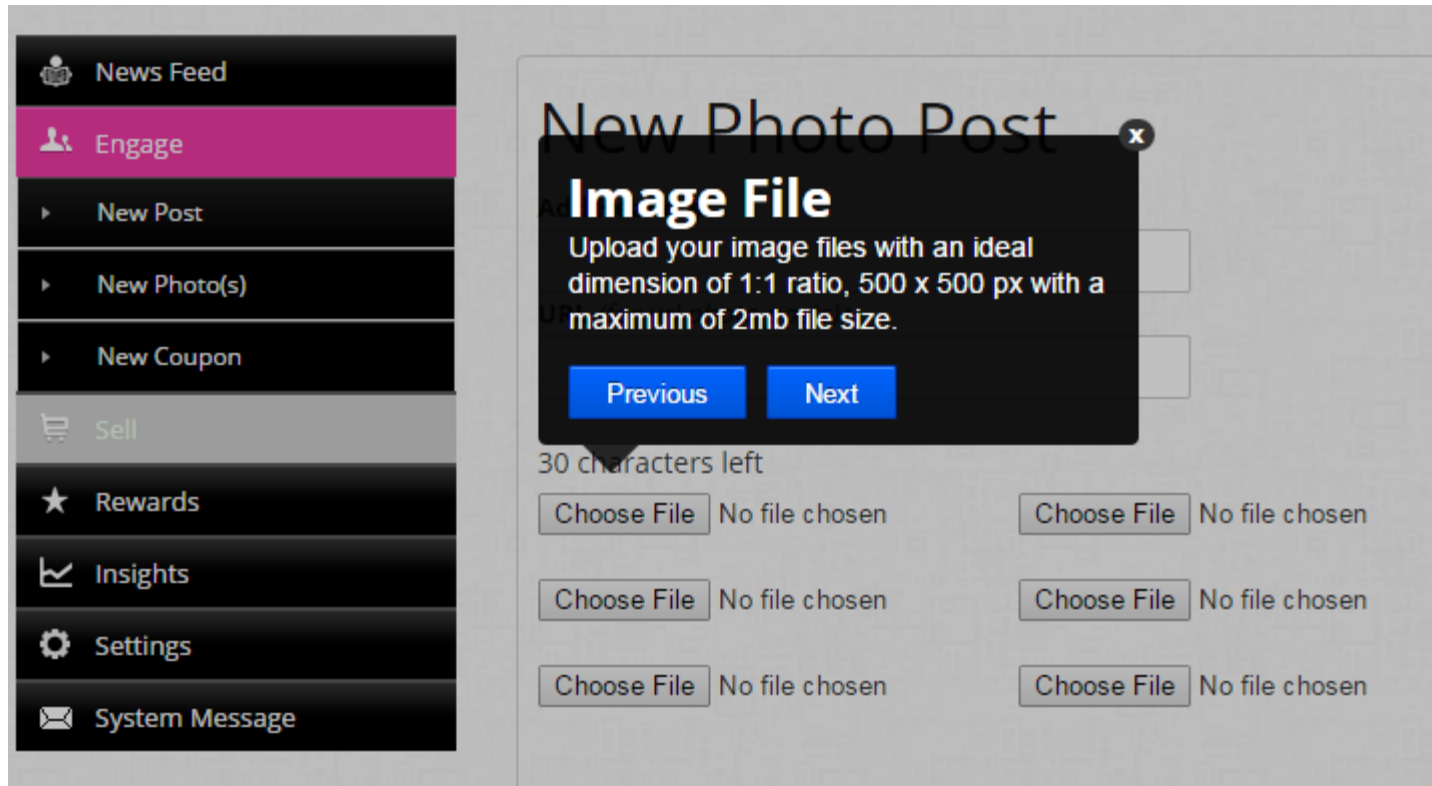
# ENGAGE > NEW PHOTO POST



The screenshot shows a 'New Photo Post' form. At the top, there's a title 'New Photo Post'. Below it is a section 'Add Headers' with a text input field. Underneath is a 'URL (for url photo posts):' field. Below the URL field, it says '30 characters left'. There are six 'Choose File' buttons arranged in two columns of three, each followed by the text 'No file chosen'. At the bottom, there is an 'Add Text' section with a text input field. A black tooltip with a close button 'x' is overlaid on the URL field. The tooltip contains the text: 'URL Optional: You can also insert an external link. NOTE: If you publish this post without a link, you would not be able to insert a link thereafter.' At the bottom of the tooltip are two blue buttons: 'Previous' and 'Next'.

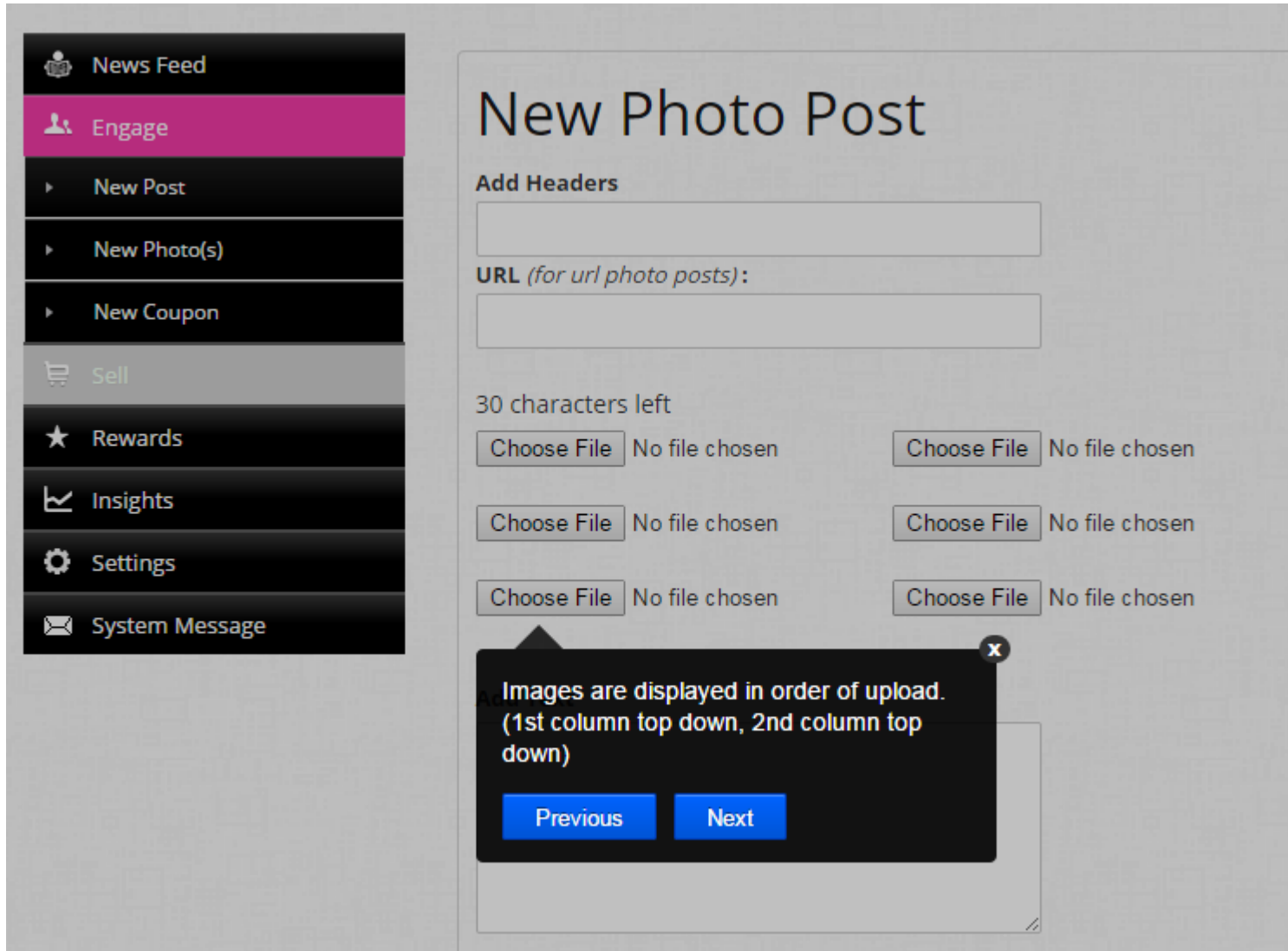
- Note : Publishing this with an external link will save the post permanently under this option. You can edit the external link at any time.

# ENGAGE > NEW PHOTO POST



- Tip : For more details on your ideal image file size, click [here to view](#) our Knowledge base article.

# ENGAGE > NEW PHOTO POST



- Tip : The sequence of image upload would be Top-down first column, followed by Top-down second column. For an image representation, click [here to view](#) our Knowledge base article.

# ENGAGE > NEW PHOTO POST

## New Photo Post

**Add Headers**

**URL** *(for url photo posts):*

30 characters left

<input type="button" value="Choose File"/> No file chosen	<input type="button" value="Choose File"/> No file chosen
<input type="button" value="Choose File"/> No file chosen	<input type="button" value="Choose File"/> No file chosen
<input type="button" value="Choose File"/> No file chosen	<input type="button" value="Choose File"/> No file chosen

**Add Text**

**Description**  
Next, fill in the description, up to 2000 characters, including spaces

[Previous](#) [Next](#)



**TAO OF SHOP**  
WAY OF OMNI-CHANNEL RETAIL

# ENGAGE > NEW PHOTO POST

**Add Text**

**Add Coupon**

No Coupon ▼

**Type of Post**

Public Post ▼

Post Now ▼

Post to Facebook

Post to Twitter

Save Publish

**Add Coupon**

Coupons are pre-created. If you have no coupons at this stage, leave this option under 'No Coupon'. You can always save your post as a draft and come back when your coupon is ready

Previous Next

- Tip : If you're undecided on the flow( should you create a coupon or post first? ), click [here to view](#) our Knowledge base article.



# ENGAGE > NEW PHOTO POST

**Add Text**

**Add Coupon**

No Coupon ▼

**Type of Post**

Public Post ▼

Post Now ▼

Post to Facebook

Post to Twitter

Save Publish

**Type of Post**  
Select to publish your post as a Public or Private Post. Use the Private Post function when you wish to send private messages based on Consumers' actions or a selected consumer database.

Previous Next

- Note : Private Post feature is available for Engage Premium & all Retail packs

# ENGAGE > NEW PHOTO POST

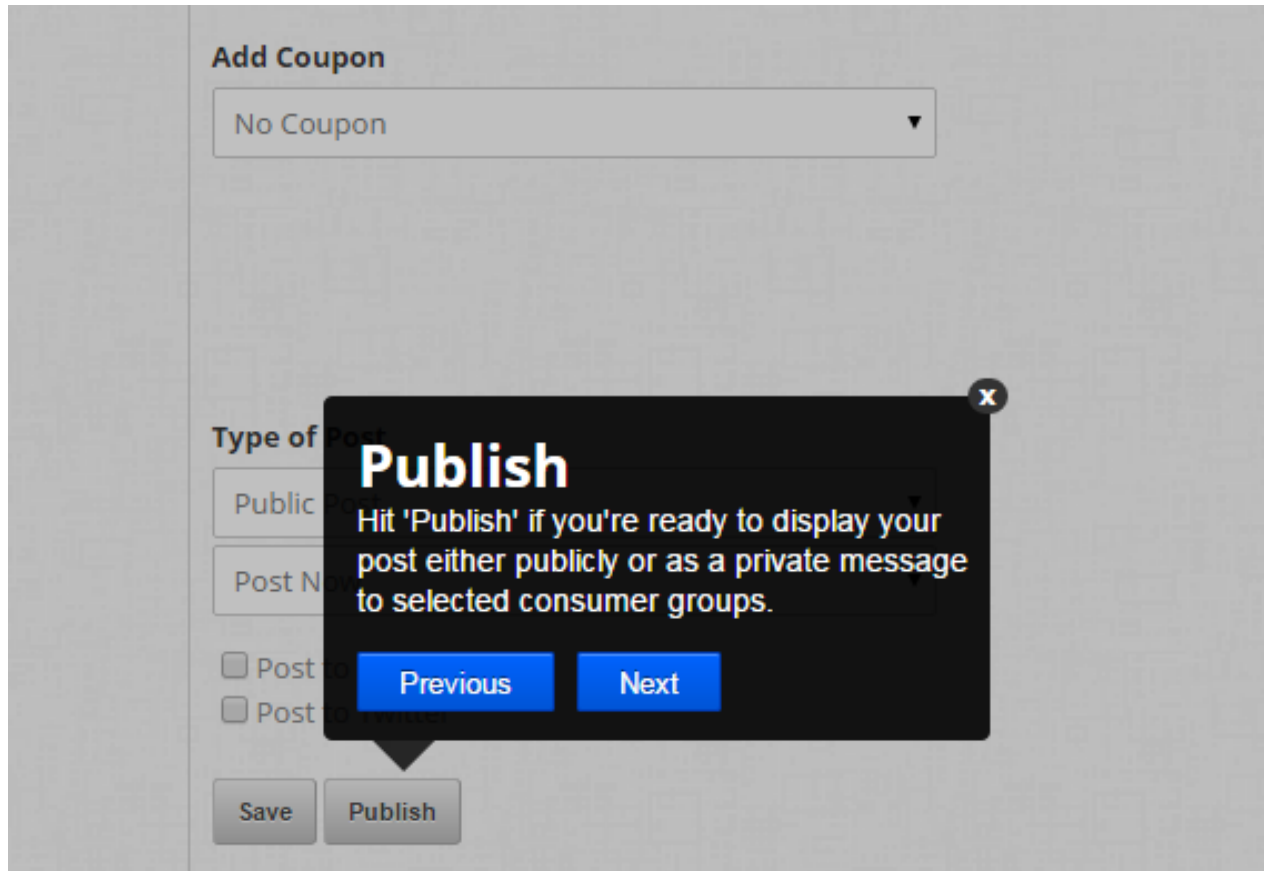
The screenshot shows a user interface for creating a new photo post. On the right side, there is a 'Type of Post' section with two dropdown menus: 'Public Post' and 'Post Now'. Below these are two checkboxes: 'Post to Facebook' and 'Post to Twitter'. At the bottom of this section are 'Save' and 'Publish' buttons. On the left side, a black tooltip with a white 'x' in the top right corner is titled 'Social Media'. The tooltip text reads: 'You also have the option to publish to your Facebook and Twitter pages simultaneously by marking the checkbox. (this feature is available for all RETAIL packs) This is possible if you'd provided us access to facilitate the linking to your social media account/s.' Below the text are two blue buttons: 'Previous' and 'Next'.

- Note : The publishing to Facebook and Twitter is only available for all Retail packs. For Engage and Engage Plus users, please contact the sales team to purchase this as an add-on.



**TAO OF SHOP**  
WAY OF OMNI-CHANNEL RETAIL

# ENGAGE > NEW PHOTO POST



- Tip : Accidentally published a post to your app? Clicking on the SAVE option will hide its visibility on your consumer apps.



TAO OF SHOP  
WAY OF OMNI-CHANNEL RETAIL

# ENGAGE > NEW PHOTO POST

## Photo Post Listing

Scroll down to view created posts under the listing here. You'll be able to visualise this after creating some content.

If it is a DRAFT, the post status will be displayed next to your content title.

You can also DELETE or EDIT each post.  
NOTE : Deleting would impact the analytical data of the post.

Previous

End

Save

Publish

Commemorate the night of death	PUBLIC	EDIT	DELETE
Top heels 2014!	PUBLIC	EDIT	DELETE
Groovy Kids shoes	PUBLIC	EDIT	DELETE
SPRING BOOTS	DRAFT PUBLIC	EDIT	DELETE
Weekends Heels!	DRAFT PUBLIC	EDIT	DELETE
Jan collection to Die For	DRAFT PRIVATE	EDIT	DELETE
Derbies	PUBLIC	EDIT	DELETE
Degrees of Happiness	PUBLIC	EDIT	DELETE
Spring Shoes You Can't Resist	PUBLIC	EDIT	DELETE

1 | 2 | 3

- Once you're familiar with how you create a post, let's move on to Coupons. End the Tour and proceed to Engage > Coupons



**TAO OF SHOP**  
WAY OF OMNI-CHANNEL RETAIL



**TAO OF SHOP**  
WAY OF OMNI-CHANNEL RETAIL

ENGAGEMENTS	
Current Month's Usage	
0	
Current Month's Balance	Top-up Balance
0	0

REFRESH

- News Feed
- Engage**
- New Post
- New Photo(s)
- New Coupon
- Sell
- Rewards
- Insights
- Settings
- System Message

## New Coupon

Add Header

Coupon Title

30 characters left

A short description about your coupon \*

Discover the Unique Taste That Warms Your Heart! A bowl of pipping hot porridge, coupled with chicken thats finger licking awesome, washed down with our special iced lemon tea... all for

short description about your coupon? make it attractive! (limit 300 characters left)

Coupon Value

<value>

Minimum Purchase

<value>

Type of Transaction

Single Transaction per User

Num Times

1

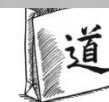
### Coupon

Coupons are a great call-to-action to drive footfall and sales!

**NOTE:** You can't publish a coupon on its own. You will need to first create a coupon and then embed it when creating and publishing a post.

Next

DOLLAR



**TAO OF SHOP**  
WAY OF OMNI-CHANNEL RETAIL

## New Coupon

**Add Header**

Coupon Title

30 characters left

**A short description about your coupon \***

Discover the Unique Taste That Warms Your Heart! A bowl of pipping hot porridge, coupled with chicken thats finger licking awesome, washed down with our special iced lemon tea... all for

short description about your coupon? make it attractive! (limit 300 characters left)

**Coupon Value**

<value>

DOLLAR

**Minimum Purchase**

<value>

**Type of Transaction**

Single Transaction per User

**Num Times**

1

Coupon for In-Store Redemptions only

### New Coupon

Enter your coupon title within 30 characters, including spaces

Previous Next



## New Coupon

**Add Header**

30 characters left

**A short description about your coupon \***

short description about your coupon? make it attractive! (limit 300 characters left)

**Coupon Value**

**Minimum Purchase**

**Type of Transaction**

**Num Times**

Coupon for In-Store Redemptions only

**DOLLAR** ▼

### Coupon Description

Fill your coupon description within 300 characters, including spaces

[Previous](#) [Next](#)



# ENGAGE > NEW COUPON

## New Coupon

**Add Header**

30 characters left

**A short description about your coupon \***

short description about your coupon? make it attractive! (limit 300 characters left)

**Coupon Value**

**Minimum Purchase**

**Type of Transaction**

**Num Times**

Coupon for In-Store Redemptions only

**Coupon Value**

Next, the discount of the coupon, which can be an absolute dollar amount or a percentage discount.

[Previous](#) [Next](#)

- Note : This feature is available for Engage Premium & all Retail packs

# ENGAGE > NEW COUPON

## New Coupon

Add Header

Coupon Title

30 characters left

A short description about your coupon \*

Discover the Unique Taste That Warms Your Heart! A bowl of pipping hot porridge, coupled with chicken thats finger licking awesome, washed down with our special iced lemon tea... all for

short description about your coupon? make it attractive! (limit 300 characters left)

Coupon Value

<value>

Minimum Purchase

<value>

Type of Transaction

Single Transaction per User

Num Times

1

Coupon for In-Store Redemptions only

DOLLAR

### Minimum Purchase

Is there a minimum purchase amount your consumer has to fulfill before this coupon can be applied? If not, indicate '0'

Previous Next

- Note : This value would appear under the T&Cs of the coupon your consumer downloads.



# ENGAGE > NEW COUPON

Coupon Value

Minimum Purchase

Type of Transaction

Num Times

Coupon for In-Store Redemptions only

WHEN is your coupon Valid?

Date / Time \* Starts  \* Ends

AM  PM    AM  PM

Tags

tag contents here

**Num Times**

Set the number of times each consumer can use this coupon



# ENGAGE > NEW COUPON

Coupon Value

Minimum Purchase

Type of Transaction

Num Times

**Date Start**  
Set its validity by indicating the start and end date

WHEN is your

Date / Time \* Starts  \* Ends

AM  PM    AM  PM

Tags

Coupon Category

Product Category

tag contents here

\*assign tags to current tag

OPTIONS



# ENGAGE > NEW COUPON

Coupon Value

Minimum Purchase

Type of Transaction

Num Times

Coupon for In-Store Redemptions only

**WHEN is your coupon Valid?**

Date / Time \* Starts  \* Ends

AM  PM    AM  PM

Tags

tag contents here

**Date End**  
down to the very minute!



# ENGAGE > NEW COUPON

Tags

Coupon Category  
Product Category

\*assign tags to current tag  
OPTIONS

## Coupon Tags

Tag the correct Coupon and Product category by clicking on each category, followed by the arrow icon.

Select from the dropdown options

[Previous](#) [Next](#)

WHAT's in the fine print

**Terms & Conditions**

Terms and Conditions apply

Ensure that you have a comprehensive set of Terms & Conditions to protect your brand and avoid confusion. 300 characters left



# ENGAGE > NEW COUPON

Tags

Coupon Category  
Product Category

>

tag contents here

\*assign tags to current tag

OPTIONS

WHAT's in the fine print

Terms & Conditions

Terms and Conditions apply

**Terms & Conditions**  
With a limit of 300 characters, your terms and conditions should be crafted to fit that specific coupon.

Previous Next

Ensure that you have a comprehensive set of Terms & Conditions to protect your brand and avoid confusion. 300 characters left

Submit Preview



# ENGAGE > NEW COUPON

Tags

Coupon Category  
Product Category

> tag contents here

\*assign tags to current tag

OPTIONS

WHAT's in the fine print

Terms & Conditions

Terms and

Ensure that your Terms & Conditions avoid confusion. 300 characters left.

Submit Preview

**Preview**

When completed, you may click on "PREVIEW" to preview and proof read the content.

Click anywhere on the screen to exit the preview.

Previous Next



# ENGAGE > NEW COUPON

Tags

Coupon Category  
Product Category

> tag contents here

\*assign tags to current tag

OPTIONS

WHAT's in the fine print

Terms & Conditions

**Submit**

Click "SUBMIT" to activate your coupon.  
When you are ready for your customers to view or use it, create a post and embed it to be published.

Previous Next

Submit Preview



Submit

Preview

## Coupon List

Your published coupon will be listed here. If it is EXPIRED, the post status will be displayed.

**IMPT:** Do note that EDITING the coupon content impacts consumers who have already downloaded your coupon.

Previous

Next

\$5 Discount Coupon	EXPIRED	EDIT
5% off Instore purchase		EDIT
10% off online voucher		EDIT
Halloween 5%		EDIT
Winter SALES	EXPIRED	EDIT
NDP 49% Discount	EXPIRED	EDIT
10% discount	EXPIRED	EDIT
\$20 discount coupon		EDIT
5% for \$100 Purchase		EDIT
Cleaning Kit @ \$1	EXPIRED	EDIT
Free SoleShiok Shoe Bag		EDIT



# ENGAGE > NEW COUPON

## Tip

If you're creating a coupon for testing purposes, include 'TEST' in your title so that you'll know which coupons to delete before you launch your app!

Previous

Next

\$5 Discount Coupon	EXPIRED	EDIT
5% off Instore purchase		EDIT
10% off online voucher		EDIT
Halloween 5%		EDIT
Winter SALES	EXPIRED	EDIT
NDP 49% Discount	EXPIRED	EDIT
10% discount	EXPIRED	EDIT
\$20 discount coupon		EDIT
5% for \$100 Purchase		EDIT
Cleaning Kit @ \$1	EXPIRED	EDIT
Free SoleShiok Shoe Bag		EDIT

- Once you're familiar with ENGAGE, check out the rest of the available modules.

# SECTION 3 : REWARD FEATURES

How to create, edit Advocacy actions and Points



**TAO OF SHOP**  
WAY OF OMNI-CHANNEL RETAIL

ENGAGEMENTS	
Current Month's Usage	
0	
Current Month's Balance	Top-up Balance
0	0

REFRESH

- News Feed
- Engage
- Sell
- Rewards**
- Advocacy Points
- Seniority
- Redemption
- Insights
- Settings
- System Message

## Create Advocacy Points

Fields with \* are required

### Action\*

Check In

### Points\*

Set the number of points consumers will earn for each action selected above. For Purchases, set points per \$1 earned. The total points would be rounded off.

### Limit\*

Set the daily limit for each action selected. For Purchases, the



**TAO OF SHOP**  
WAY OF OMNI-CHANNEL RETAIL

# REWARDS > ADVOCACY POINTS

## Create Advocacy Points

Fields with \* are required

### Action\*

Manual Check in ▼

### Points\*

Set the number of points consumers will earn for each action selected above. For Purchases, set points per \$1 earned. The total points would be rounded off.

### Limit\*

Set the daily limit for each action selected. For Purchases, the daily limit does not apply.

Create

To encourage consumers to engage more with your brand, you can set reward points for a list of Advocacy actions here. Creating these actions also activate data tracking. For instance, if you're keen to know the rate of consumers checking in to your outlets due to a promotion, setting up the MANUAL CHECKIN action would allow you to do just that.

Next



TAO OF SHOP  
WAY OF OMNI-CHANNEL RETAIL

## Create Advocacy Points

Fields with \* are required

### Action\*

Manual Check in

### Points\*

Set the number of points consumers will earn for each action selected above. For Purchases, set points per \$1 earned. The total points would be rounded off.

### Limit\*

Set the daily limit for each action selected. For Purchases, the daily limit does not apply.

Create

All the available Advocacy actions would be found in the dropdown list here. (SHARE, REGISTRATION, MANUAL CHECKIN)

Select the action before proceeding to the points.

Previous

Next



## Create Advocacy Points

Fields with \* are required

### Action\*

Manual Check in

### Points\*

Set the number of points consumers will earn for each action selected above. For Purchases, set points per \$1 earned. The total points would be rounded off.

### Limit\*

Set the daily limit for each action selected. For Purchases, the daily limit does not apply.

Create

Input the points your consumers gain each time they perform this action (no decimals allowed, e.g. 1.5 points)

Previous

Next



## Create Advocacy Points

Fields with \* are required

### Action\*

Manual Check in

### Points\*

Set the number of points consumers will earn for each action selected above. For Purchases, set points per \$1 earned. The total points would be rounded off.

### Limit\*

Set the daily limit for each action selected. For Purchases, the daily limit does not apply.

Create

Set the DAILY limit here. For example, you can set a SHARE action to gain 1 point, up to 5 times a day.

Previous

Next

- Note : There is no daily limit for Purchase points.



## Create Advocacy Points

Fields with \* are required

### Action\*

Manual Check in

### Points\*

Set the number of points consumers will earn for each action selected above. For Purchases, set points per \$1 earned. The total points would be rounded off.

### Limit\*

Set the daily limit for each action selected. For Purchases, the daily limit does not apply.

Create

Remember to click CREATE.

Previous

Next

## Advocacy Points

Advocacy Points



# REWARDS > ADVOCACY POINTS

## Advocacy Points

Advocacy Points

4 items

	Action	Points	Limit
X	<a href="#">Purchase</a>	1	
X	<a href="#">Share</a>	5	10
X	<a href="#">Registration</a>	5	1
X	<a href="#">Manual Check in</a>	10	5

Once your Advocacy action is created, it will display in this table here. You'll be able to visualise this better once you've activated the action after this tour.

Previous

Next



TAO OF SHOP  
WAY OF OMNI-CHANNEL RETAIL

# REWARDS > ADVOCACY POINTS

## Advocacy Points

Advocacy Points 4 items

Action	Points	Limit
<u>Purchase</u>	1	
<u>Share</u>	5	10
<u>Registration</u>	5	1
<u>Manual Check in</u>	10	5

1) Clicking on the action name allows you to edit.

2) Clicking on the 'X' icon deletes it completely. Once deleted, this action will return to the dropdown list on top. (you will need to refresh the page to view it)

[Previous](#) [Next](#)



# REWARDS > ADVOCACY POINTS

## Create Advocacy Points

*Fields with \* are required*

**Action\***

Check In ▾

**Points\***

Set the number of points consumers will earn for each action selected above. For Purchases, set points per \$1 earned. The total points would be rounded off.

**Limit\***

Set the daily limit for each action selected. For Purchases, the daily limit will apply to the number of transactions per day.

Create

Once you're familiar, go back to POST to create a test PRIVATE POST based on the selected action, e.g. SHARE. Experience how a consumer would receive a private message from you when they next share a post or product from your apps.

Previous End

- We've come to the end Rewards > Advocacy Points. Let's proceed to Redemption.

# REWARDS > SENIORITY



**TAO OF SHOP**  
WAY OF OMNI-CHANNEL RETAIL

ENGAGEMENTS	
Current Month's Usage	
0	
Current Month's Balance	Top-up Balance
UNLIMITED	0

REFRESH

- News Feed
- Engage
- Sell
- Rewards**
- Advocacy Points
- Seniority
- Redemption
- Insights
- Settings
- System Message

## Create Seniority Tier

*Fields with \* are required*

**Seniority Tier Name\***

**Score\***

Create

## Seniority Tiers

Seniority Tiers

- As your members' reward points accumulate over time through the Advocacy Actions they perform, you would want them to have a sense of differentiation. Having a seniority tier does just that.



**TAO OF SHOP**  
WAY OF OMNI-CHANNEL RETAIL

# REWARDS > SENIORITY

News Feed

Engage

Sell

★ Rewards

▶ Advocacy Points

▶ Seniority

▶ Redemption

↳ Insights

⚙ Settings

✉ System Message

## Create Seniority Tier

*Fields with \* are required*

Seniority Tier Name\*

Score\*

Create

### Seniority Tiers

Seniority Tiers

### Create Seniority Tiers

Seniority points are cumulative and a reflection of the total Reward points consumers have gained from the time they register to your app. Setting up Seniority tiers allow consumers to have a sense of differentiation.

As with any well-thought through loyalty program, this could be rewarding for both your consumers and brand.

Next

- To create your Seniority tiers, click on **Rewards > Seniority**

# REWARDS > SENIORITY

News Feed

Engage

Sell

**Rewards**

Advocacy Points

Seniority

Redemption

Insights

Settings

System Message

## Create Seniority Tier

*Fields with \* are required*

**Seniority Tier Name\***

**Score\***

Create

### Seniority Tiers

Seniority Tiers

### Seniority Tier Name

To start, name the seniority tier (this should be something that is easy to understand and for your members to identify with)

Previous Next

- Tip : Tier names are editable at any time

# REWARDS > SENIORITY

The screenshot shows a user interface for creating a seniority tier. On the left is a navigation menu with options: News Feed, Engage, Sell, Rewards (highlighted), Advocacy Points, Seniority, Redemption, Insights, Settings, and System Message. The main content area is titled 'Create Seniority Tier' and includes a note: 'Fields with \* are required'. There are two input fields: 'Seniority Tier Name\*' and 'Score\*'. A 'Create' button is positioned below the 'Score\*' field. A tooltip box on the right, titled 'Score', explains: 'Indicate total points required to reach this tier' and contains 'Previous' and 'Next' buttons. Below the form, a section titled 'Seniority Tiers' shows a list with one item, 'Seniority Tiers', and a count of '4 items' at the bottom right.

- This is instantaneous and reflected on your consumers' virtual membership card ( mobile) and members' account ( web)

# REWARDS > SENIORITY

News Feed

Engage

Sell

★ Rewards

▸ Advocacy Points

▸ Seniority

▸ Redemption

✓ Insights

⚙ Settings

✉ System Message

## Create Seniority Tier

*Fields with \* are required*

Seniority Tier Name\*

Score\*

Create

Remember to click CREATE

Previous Next

- Once you've clicked CREATE, scroll down to view your Seniority Tier table.

Settings

System Message

## Seniority Tier Table

Once your Seniority Tier is created, it will display in this table here. You'll be able to visualise this better once you've created a Seniority Tier after this tour.

Previous

Next

## Seniority Tiers

Seniority Tiers

Sort by: Name

	Seniority Tier Name	Points
X	<u>NEW MEMBER</u>	<u>10</u>
X	<u>Bronze</u>	<u>500</u>
X	<u>Silver</u>	<u>800</u>
X	<u>GOLD</u>	<u>1000</u>



TAO OF SHOP  
WAY OF OMNI-CHANNEL RETAIL

# REWARDS > SENIORITY

Score\*

Create

## Seniority Tiers

Seniority Tiers

4 items

Sort by: Name | Time Logged

1) Clicking on the Tier Name allows you to edit.

2) Clicking on the 'X' icon deletes it completely.

**NOTE:** This impacts consumers who have already achieved this seniority tier.

Previous Next

	Seniority Tier Name	Points
X	<a href="#">NEW MEMBER</a>	<a href="#">10</a>
X	<a href="#">Bronze</a>	<a href="#">500</a>



## Edit Seniority Tier

*Fields with \* are required*

**Seniority Tier Name\***

**Score\***

- Once you've made the edits, click SAVE. Click [here](#) to view our Knowledge base article.



**TAO OF SHOP**  
WAY OF OMNI-CHANNEL RETAIL

## Create Seniority Tier

*Fields with \* are required*

**Seniority Tier Name\***

**Score\***

Create

**NOTE**

While you can edit Seniority Tiers at any time, it is recommended to finalise the points before you announce your program to your consumers.

Previous End

### Seniority Tiers

Seniority Tiers
-----------------

- Now that you're familiar with the creating of Seniority Tiers, let's take look at how Redemption items are created. Go to REWARDS > REDEMPTION when you're ready.

# REWARDS > REDEMPTION

- News Feed
- Engage
- Sell
- Rewards**
- Advocacy Points
- Seniority
- Redemption**
- Insights
- Settings
- System Message

## Redemption Items

*Fields with \* are required*

**Expiry Date\***

  
**Name\***

## Redemption Items

*Fields with \* are required*

**Expiry Date\***

  
**Name\***  
**Points\***  
**Quantity\***

### Redemption Items

Redemption Items are created to facilitate redemption by your consumers using accumulated reward points. Consumers can view the list of items via your app while actual redemption is done at your physical outlets. To track redemption, use your Store Assist App to scan consumers' virtual membership card > select item > Redeem.

[Next](#)



# REWARDS > REDEMPTION

## Redemption Items

*Fields with \* are required*

**Expiry Date\***

**Name\***

**Points\***

**Quantity\***

**Status**

Visible

Hidden

First, set the expiry date. Once expired, this item will continue to appear in the redemption list but no longer be redeemable.

Previous

Next



**TAO OF SHOP**  
WAY OF OMNI-CHANNEL RETAIL

# REWARDS > REDEMPTION

## Redemption Items

*Fields with \* are required*

**Expiry Date\***

  
**Name\***  
**Points\***  
**Quantity\***  
**Status**

- Visible
- Hidden

Name your redemption item. Be concise yet descriptive. If consumers view the list via your mobile app, only the item name will be seen.

Previous

Next



**TAO OF SHOP**  
WAY OF OMNI-CHANNEL RETAIL

# REWARDS > REDEMPTION

## Redemption Items

*Fields with \* are required*

**Expiry Date\***

  
**Name\***  
**Points\***  
**Quantity\***  
**Status**

- Visible
- Hidden

Set the points required for redemption

Previous

Next



**TAO OF SHOP**  
WAY OF OMNI-CHANNEL RETAIL

## Redemption Items

*Fields with \* are required*

**Expiry Date\***

**Name\***

**Points\***

**Quantity\***

**Status**

- Visible  
 Hidden

Publish

Set available quantity. (Once the cap is reached, consumers will not be able to redeem any more of this item. This quantity can be adjusted by you at any time)

Previous

Next



# REWARDS > REDEMPTION

★ Rewards

- ▶ Advocacy Points
- ▶ Seniority
- ▶ Redemption
- ↳ Insights
- ⚙ Settings
- ✉ System Message

*Fields with \* are required*

**Expiry Date\***

  
**Name\***  
**Points\***  
**Quantity\***  
**Status**

If you wish to pre-upload items, you can adjust the visibility status here. To hide a redemption item from the list, indicate the status as HIDDEN.



# REWARDS > REDEMPTION

Once your Redemption Item is created, it will display in this table here. You'll be able to visualise this better once you've created an item after this tour.

Previous

Next

## Redemption Items

11 items

Sort by: Name | Time Logged

Name	Hide	Points	Quantity	Expiry	Status
X birthday	<input checked="" type="checkbox"/>	10	1000	18/07/2014	EXPIRED
X Mystery gift	<input type="checkbox"/>	1	50	31/07/2015	ACTIVE



**TAO OF SHOP**  
WAY OF OMNI-CHANNEL RETAIL

# REWARDS > REDEMPTION

**Status**

Visible  
 Hidden

Public

Rede

1) Click on the Redemption Item name to edit.  
2) Click on the 'X' icon to delete.

Previous Next

	Name	Hide	Points
X	birthday	<input checked="" type="checkbox"/>	10
X	Mystery gift	<input type="checkbox"/>	1
X	Fratelli Rossiti shoe polish set	<input type="checkbox"/>	20



# REWARDS > REDEMPTION

Redemption Items 11 items

Sort by: X Name | Time Logged

Name	Quantity	Points	Expiry	Status	
<span>X</span> birthday	10	1000	18/07/2014	EXPIRED	
<span>X</span> Mystery gift	50		31/07/2015	ACTIVE	
<span>X</span> Fratelli Rossiti shoe polish set	<input type="checkbox"/>	20	1000	31/12/2014	ACTIVE
<span>X</span> Crossband multi coloured shoe leather laces for kids	<input type="checkbox"/>	10	100	28/11/2014	ACTIVE

The status column indicates the validity of the item. INACTIVE status indicate that the item has gone past its expiry date. To edit, click on the redemption item name to extend the redemption date.

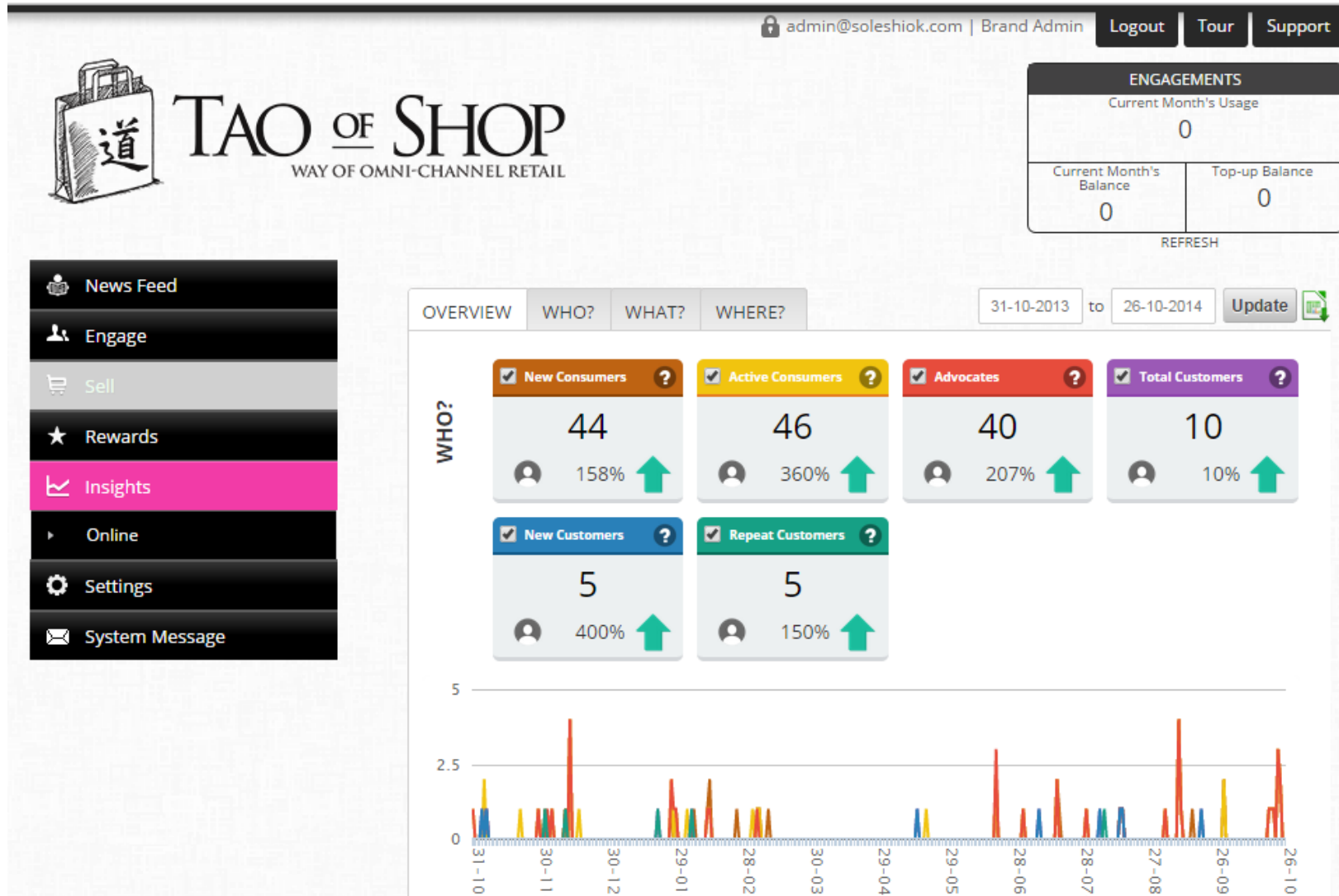
[Previous](#) [Next](#)

- We've come to the end Rewards > Redemption. Let's move on to INSIGHTS.

# SECTION 4 : INSIGHTS

How to access and understand your Insights

# INSIGHTS



- Tip : To access Insights, scroll down from your side navigation bar, click on Insights > Online> Overview



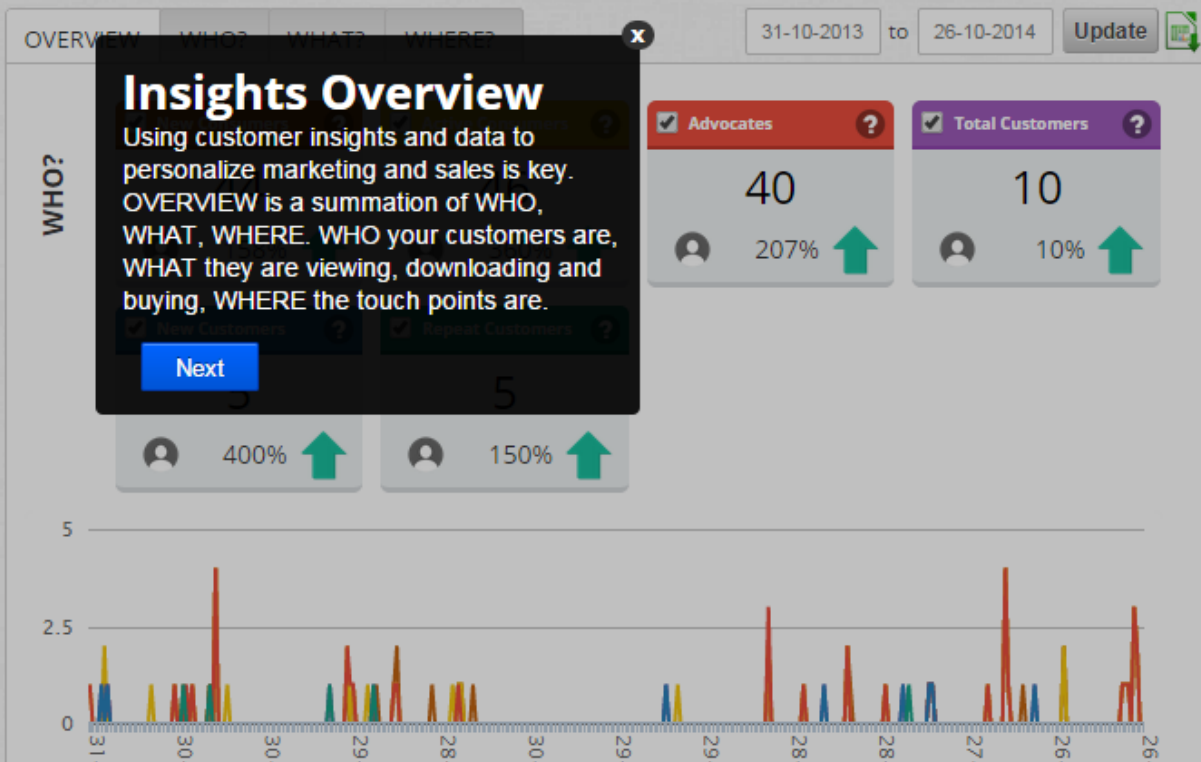
**TAO OF SHOP**  
WAY OF OMNI-CHANNEL RETAIL

ENGAGEMENTS	
Current Month's Usage	
0	
Current Month's Balance	Top-up Balance
0	0

Start Tour

REFRESH

- News Feed
- Engage
- Sell
- Rewards
- Insights**
- Online
- Settings
- System Message

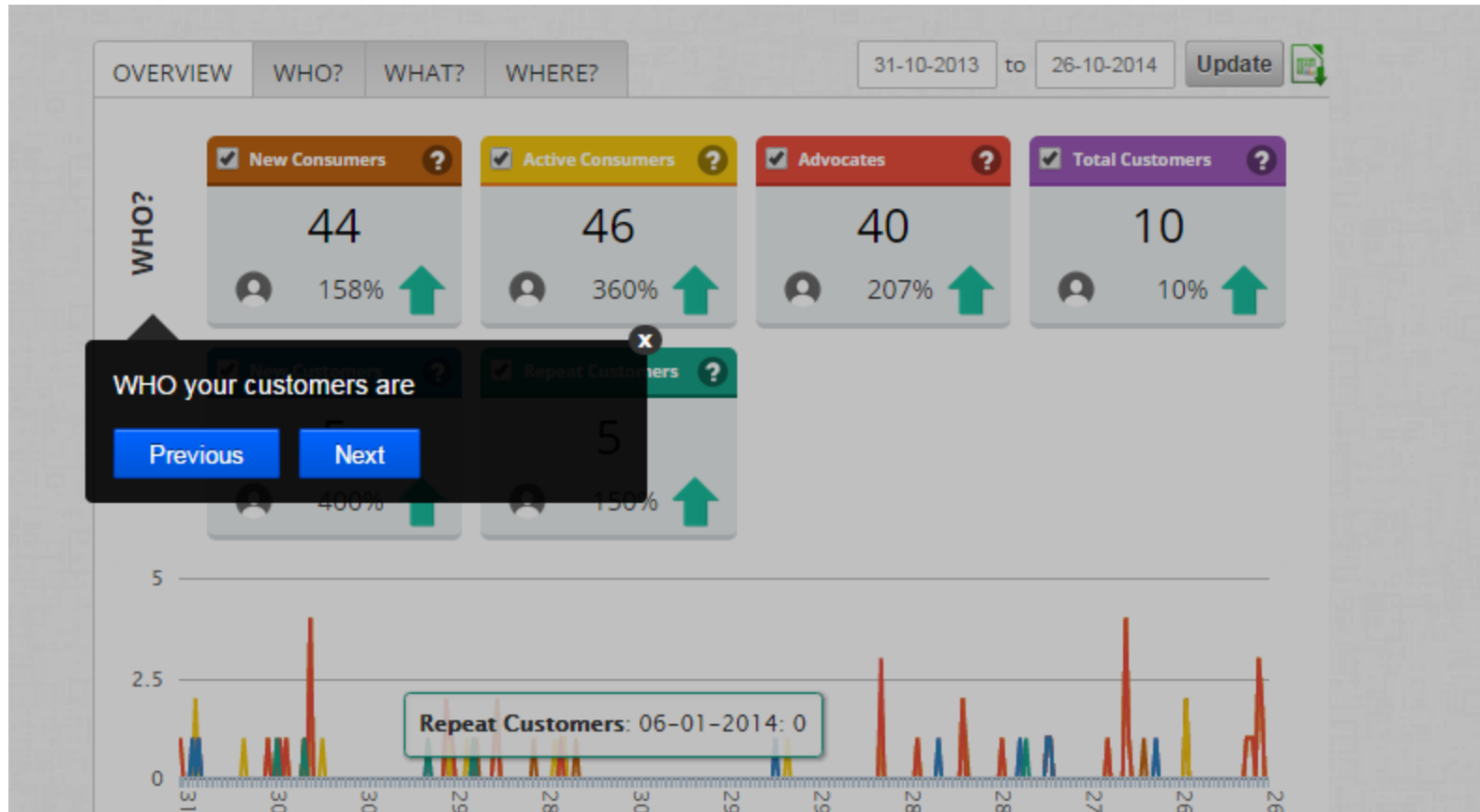


- Tip : Click to read our Knowledge base article [here](#)



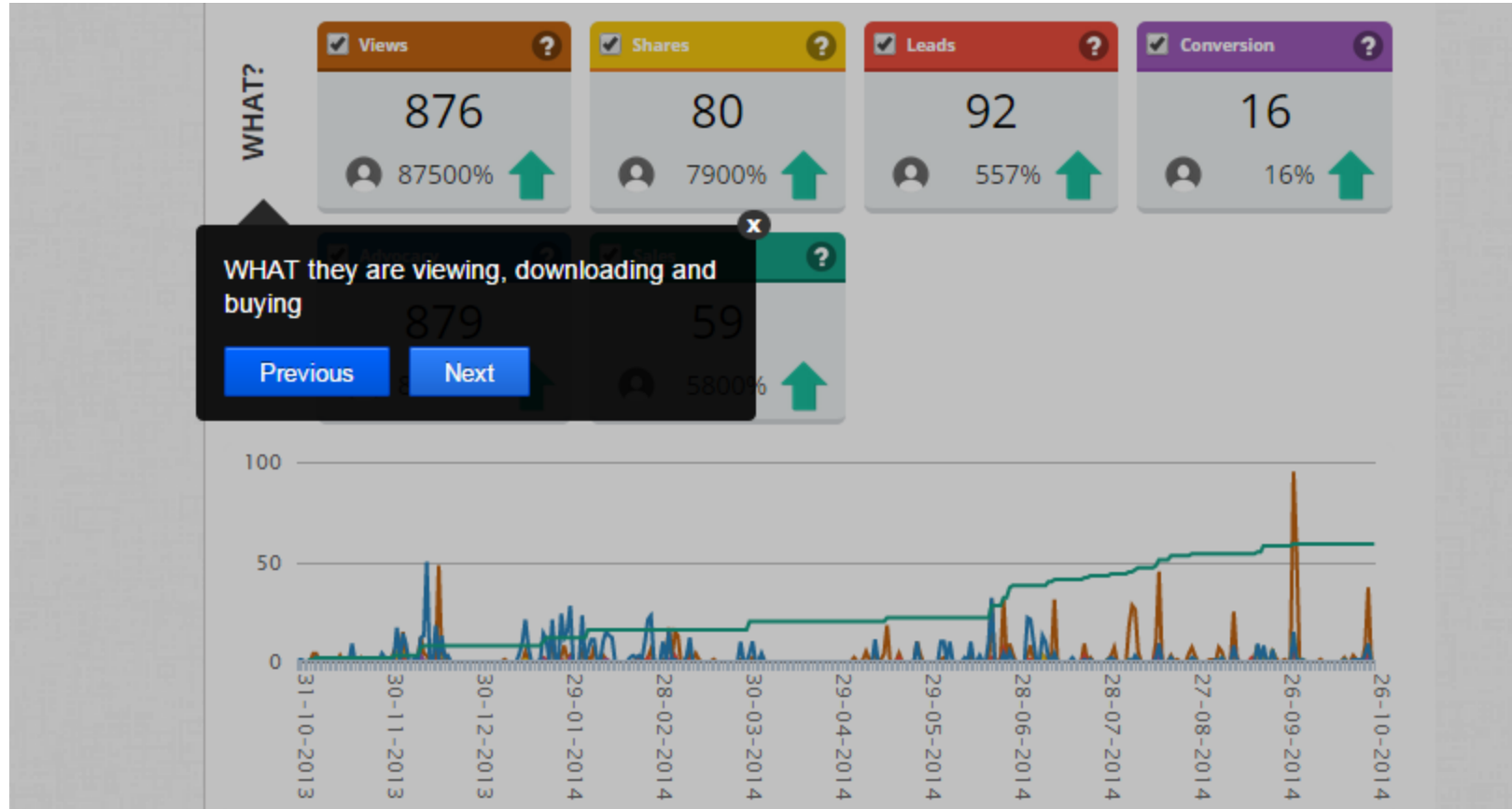
**TAO OF SHOP**  
WAY OF OMNI-CHANNEL RETAIL

# INSIGHTS



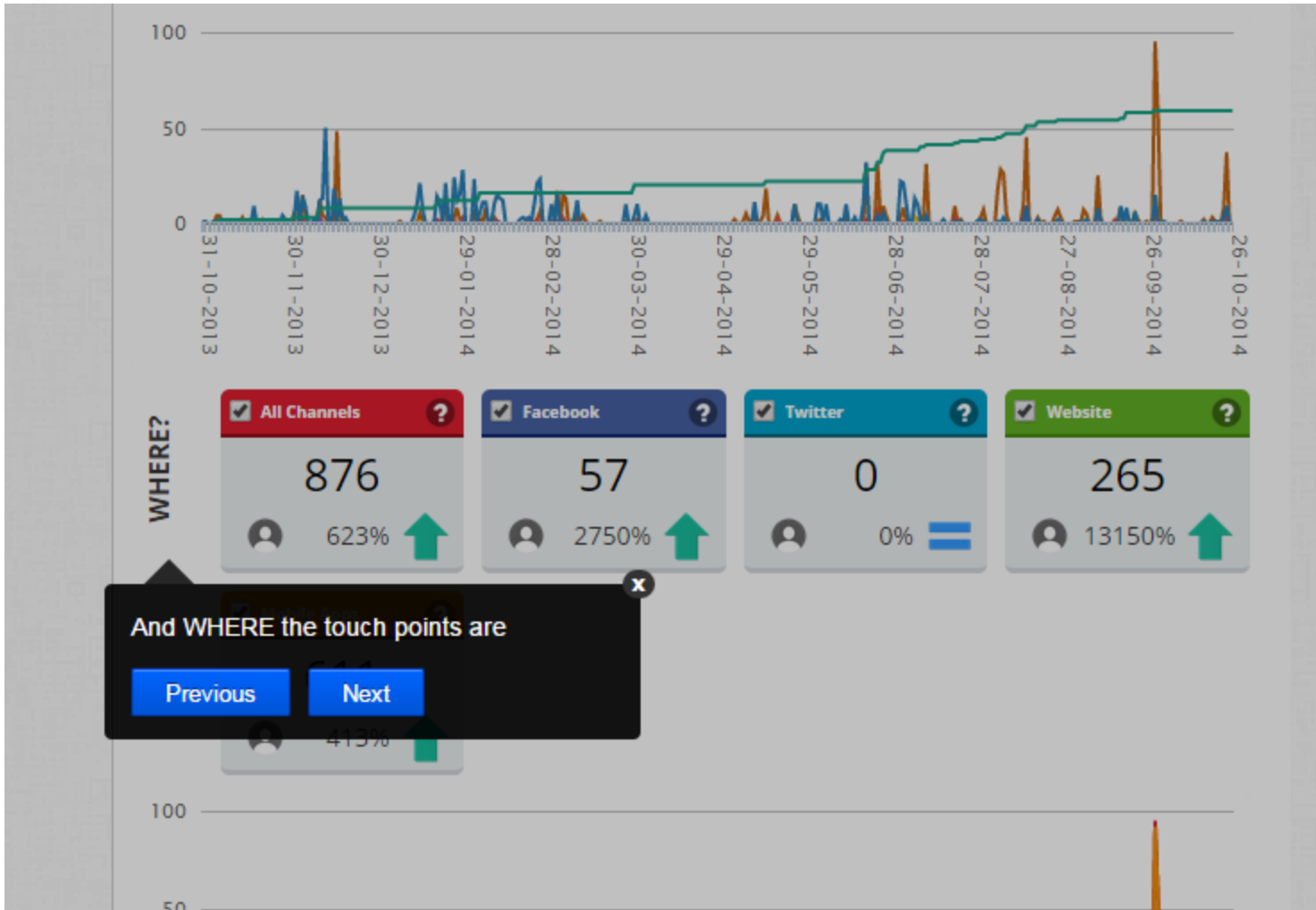
- Tip : Click on each human icon to download specific consumer data in that segment.

# INSIGHTS



**TAO OF SHOP**  
WAY OF OMNI-CHANNEL RETAIL

# INSIGHTS



**TAO OF SHOP**  
WAY OF OMNI-CHANNEL RETAIL

# INSIGHTS



TAO OF SHOP  
WAY OF OMNI-CHANNEL RETAIL

## ENGAGEMENTS

Current Month's Usage

0

Current Month's Balance

0

Top-up Balance

0

REFRESH

Start Tour

Click here to familiarize yourself with the definition of each metric terms

Previous

Next

OVERVIEW

WHO?

31-10-2013

to

26-10-2014

Update



WHO?

New Consumers ?

44

158% ↑

Active Consumers ?

46

360% ↑

Advocates ?

40

207% ↑

Total Customers ?

10

10% ↑

New Customers ?

5

400% ↑

Repeat Customers ?

5

150% ↑

5

2.5

0

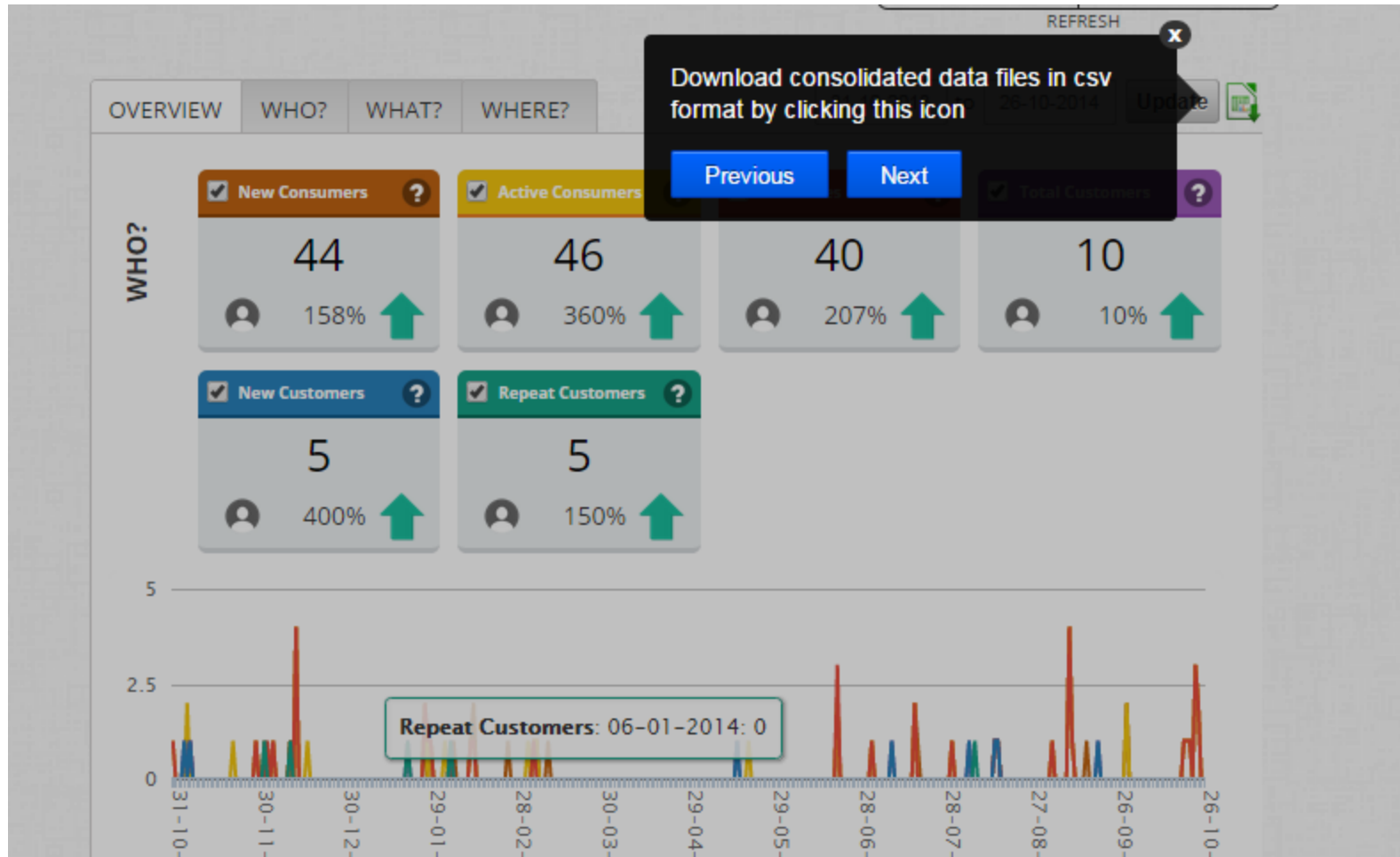
Repeat Customers: 06-01-2014: 0

- News Feed
- Engage
- Sell
- Rewards
- Insights**
- Online
- Settings
- System Message

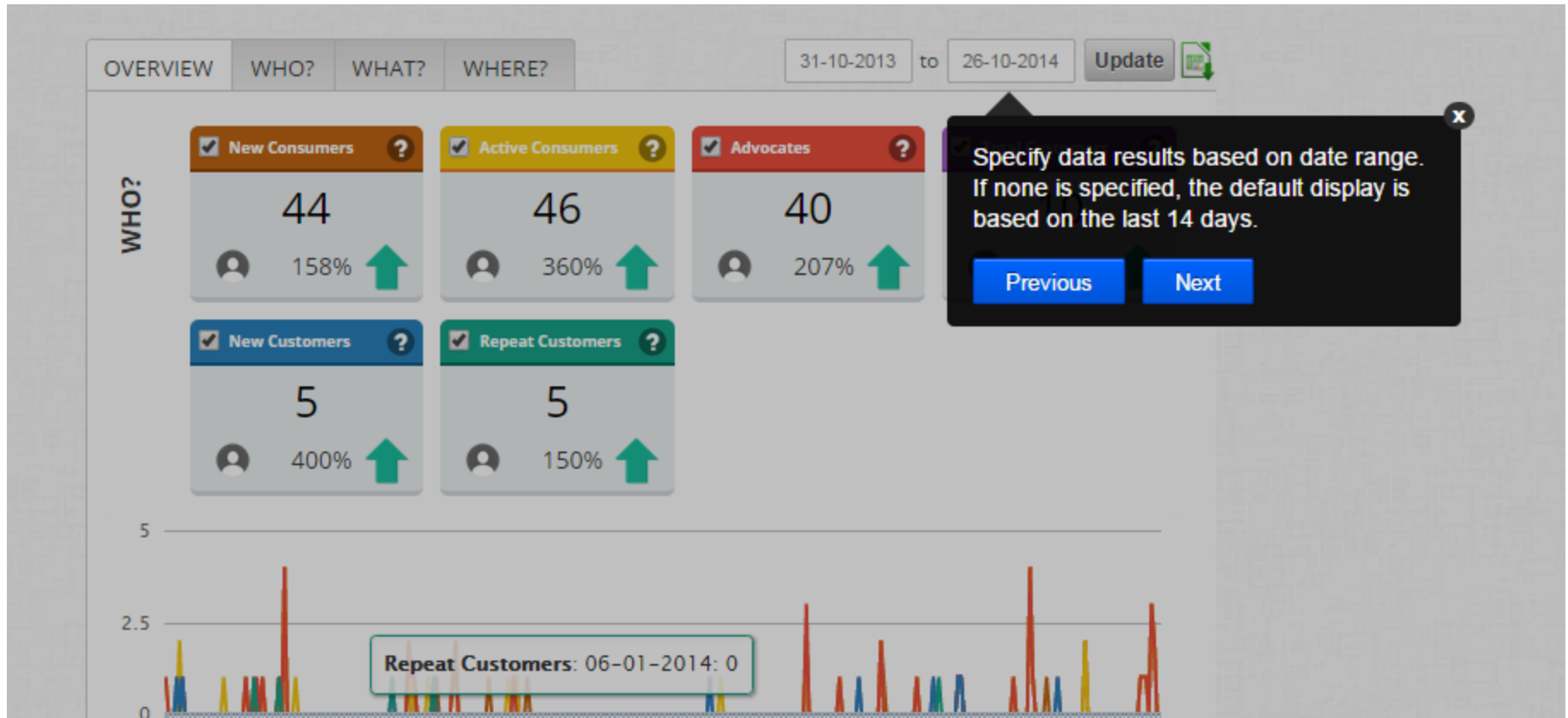


TAO OF SHOP  
WAY OF OMNI-CHANNEL RETAIL

# INSIGHTS

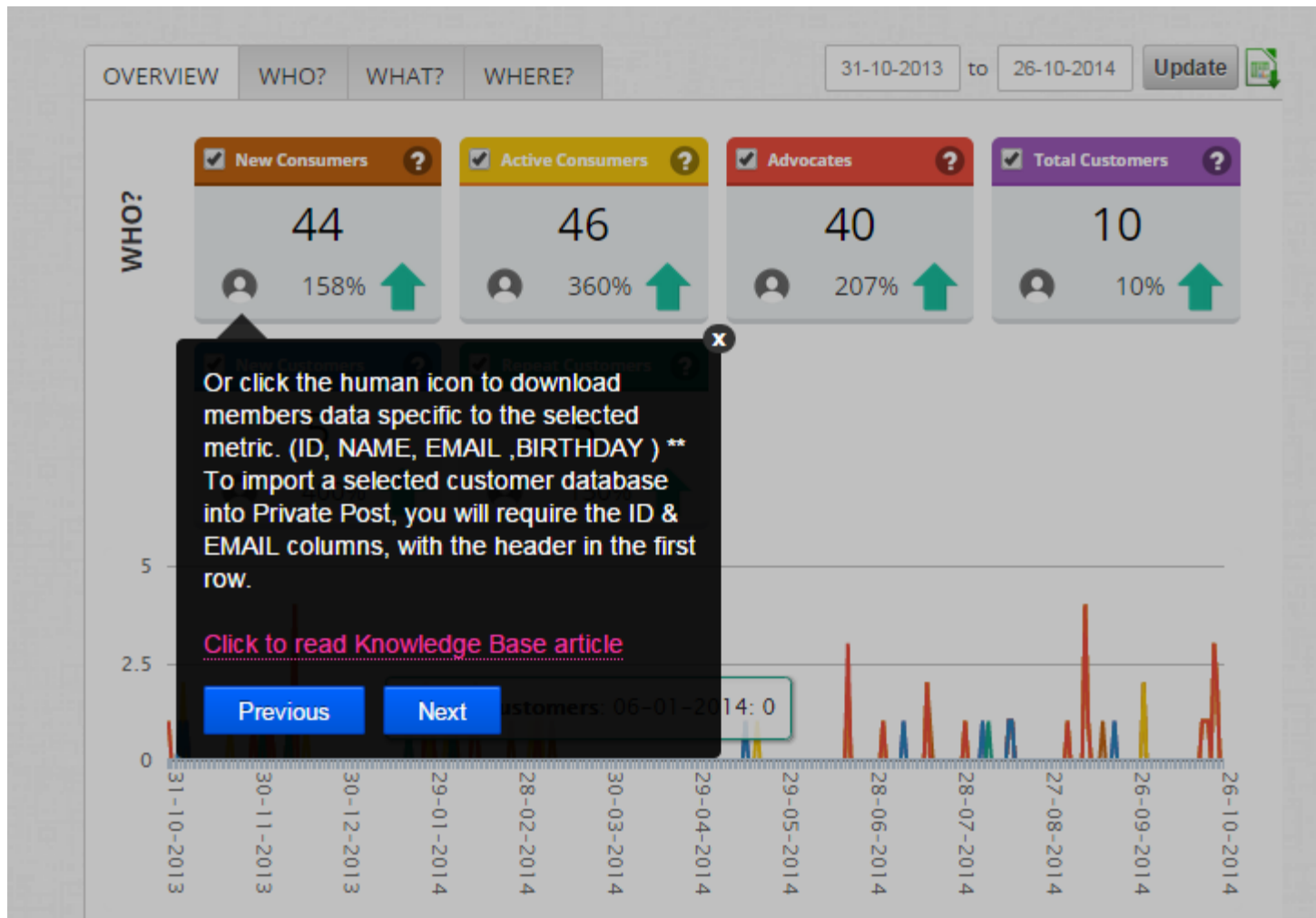


# INSIGHTS

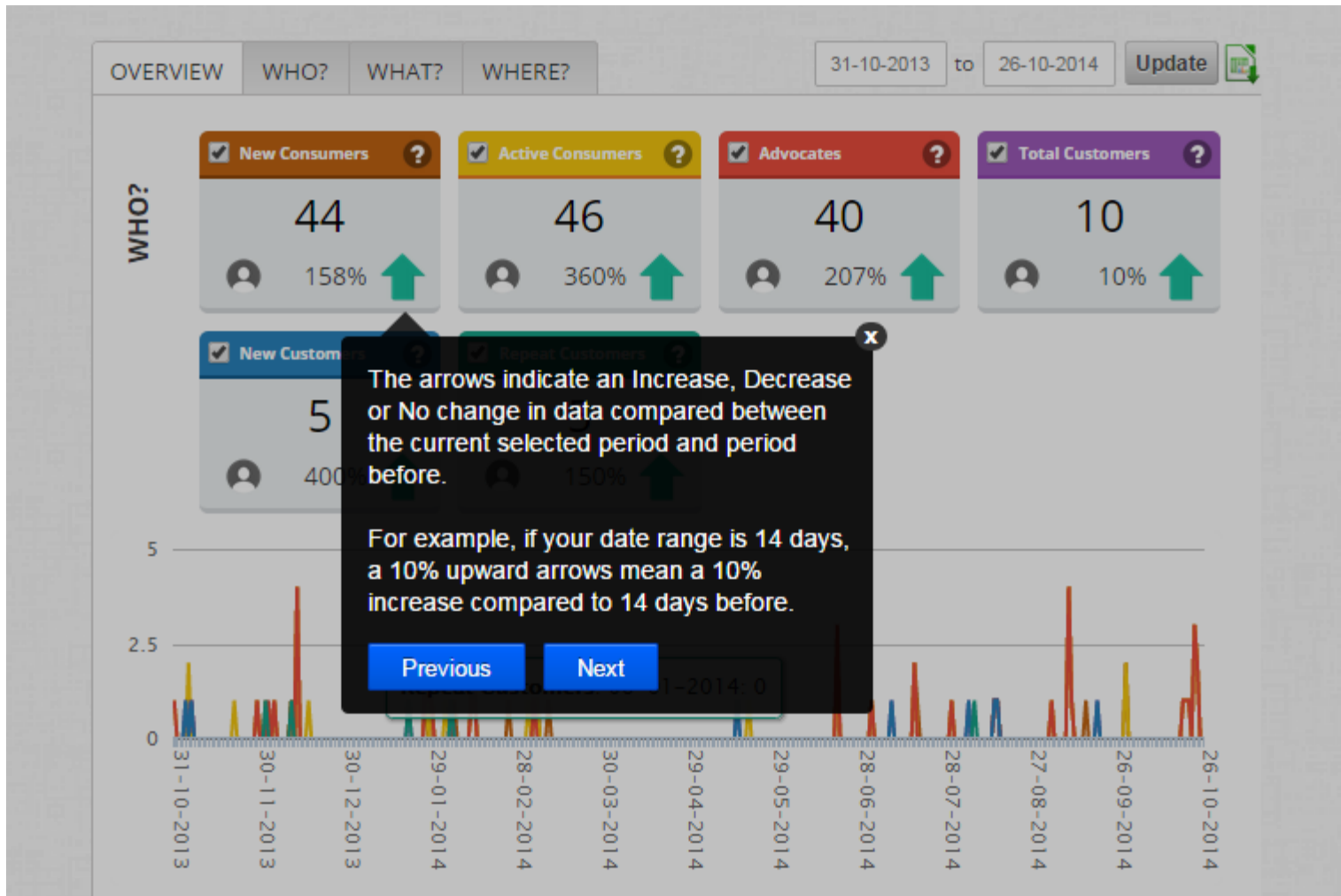


- Note : If the selected date range is wide, it might take a longer time for the page to load.

# INSIGHTS

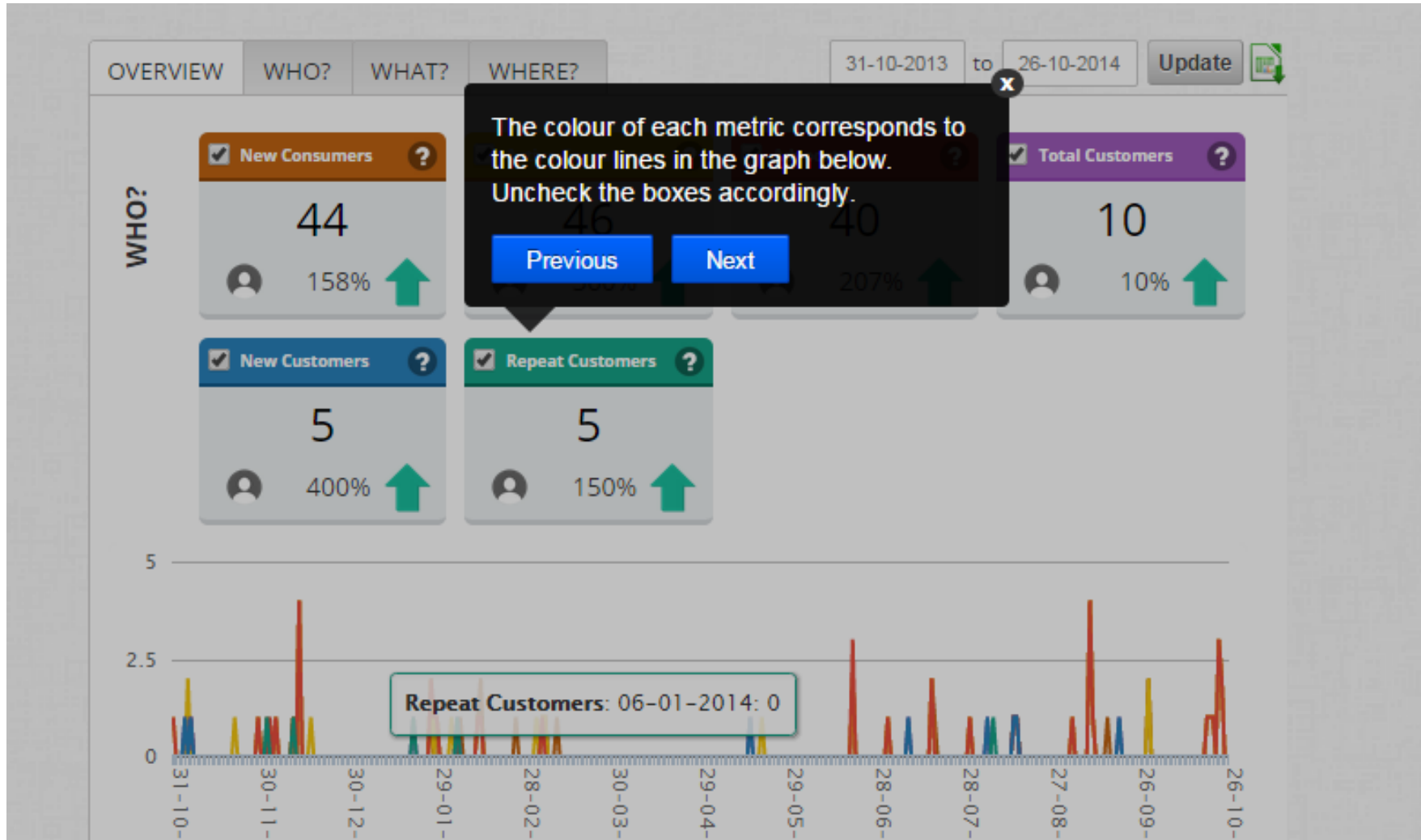


# INSIGHTS



**TAO OF SHOP**  
WAY OF OMNI-CHANNEL RETAIL

# INSIGHTS



- Note : The detailed breakdown of WHO, WHAT, WHERE is available for Engage Premium and all Retail packs. Find out exactly what drives the highest engagement, coupon downloads, conversion, and more.



## SECTION 5 : SETTINGS

How to reset your password and view account details

# SETTINGS > MY ACCOUNT

admin@soleshiok.com | Brand Admin Logout Tour Support

TAO OF SHOP  
WAY OF OMNI-CHANNEL RETAIL

News Feed  
Engage  
Sell  
Rewards  
Insights  
**Settings**  
My Account  
Account Activity  
System Message

**MY ACCOUNT**

SAVE

Account Details

Email: admin@soleshiok.com  
Name: soleshiok

Password

Re enter password

**My Account Settings**  
On the My Account page, you can view your account email , name and reset your password.

Password should be changed on a regularly basis and kept digitally secure.

Next

ENGAGEMENTS

Current Month's Usage  
0

Next Month's Balance  
0


Top-up Balance  
0


REFRESH


Start Tour


- Tip : if you're working with a team, be sure that the changing of password is communicated well, and kept safe.


# SETTINGS > MY ACCOUNT


 News Feed


 Engage


 Sell


 Rewards

 Insights

 Settings

 My Account

 Account Activity

 System Message

## MY ACCOUNT

SAVE

This is the set of information provided by you prior to the creation of the Admin Dashboard Account.

Previous

Next

Account Details

Email: admin@soleshiok.com

Name: soleshiok


Password


Re enter password





TAO OF SHOP  
WAY OF OMNI-CHANNEL RETAIL


# SETTINGS > MY ACCOUNT


 News Feed


 Engage


 Sell


 Rewards

 Insights

 Settings

 My Account

 Account Activity

 System Message

## MY ACCOUNT

SAVE

Account Details

Email: admin@soleshiok.com

Name: soleshiok

Password

Re enter password

Enter the new 8 digit alphanumeric password (with random letters, digits and punctuation).

The more complex your password, the tougher to crack.

Previous

Next



TAO OF SHOP  
WAY OF OMNI-CHANNEL RETAIL

# SETTINGS > MY ACCOUNT

**MY ACCOUNT**

SAVE

Account Details

Email: admin@soleshiok.com  
Name: soleshiok

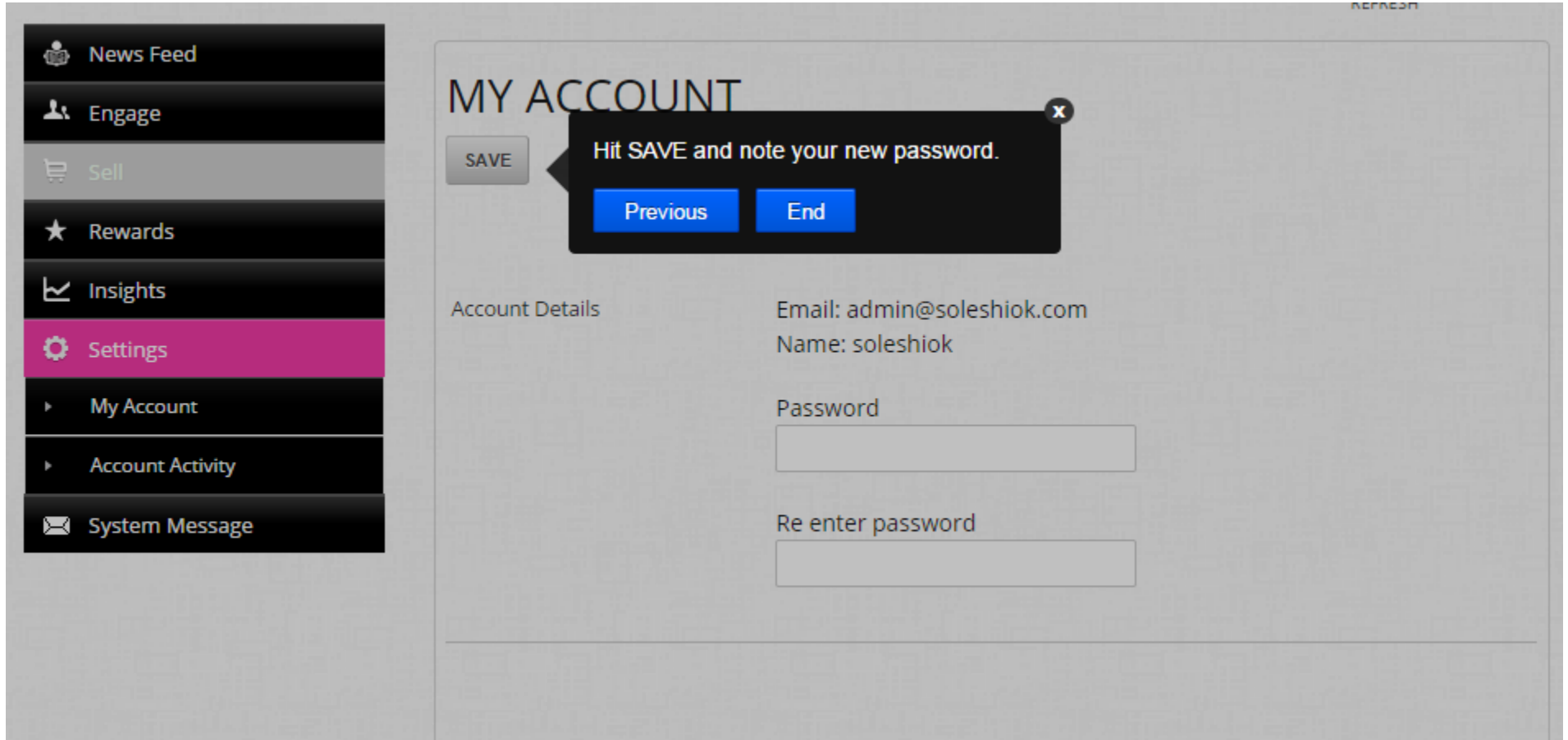
Password

Re enter password

Re-confirm the password

Previous Next

# SETTINGS > MY ACCOUNT



The screenshot shows a mobile application interface. On the left is a vertical navigation menu with the following items: News Feed, Engage, Sell, Rewards, Insights, Settings (highlighted in pink), My Account, Account Activity, and System Message. The main content area is titled 'MY ACCOUNT' and contains a 'SAVE' button. A black notification box with a close button (x) is overlaid on the 'SAVE' button, containing the text 'Hit SAVE and note your new password.' and two blue buttons labeled 'Previous' and 'End'. Below the notification, the 'Account Details' section displays the following information: Email: admin@soleshiok.com, Name: soleshiok, Password (with an empty input field), and Re enter password (with an empty input field).

# SETTINGS > ACCOUNT ACTIVITY

- News Feed
- Engage
- Sell
- Rewards
- Insights
- Settings**
- My Account
- Account Activity
- System Message

## ACCOUNT ACTIVITY

Date Joined | August 29, 2013

Statement Period | Sep 01, 2014 - Oct 01, 2014

Select Statement |

## SUMMARY

Account ID | admin@soleshiok.com

Your Current Pack | TAO OF SHOP ENGAGE PREMIUM

Monthly Package Engagements |

Package Engagements for this Month	No.
Current Month's Usage	0
Current Month's Balance	0



**TAO OF SHOP**  
WAY OF OMNI-CHANNEL RETAIL

# SETTINGS > ACCOUNT ACTIVITY

admin@soleshiok.com | Brand Admin [Logout](#) [Tour](#) [Support](#)

**Account Activity**  
On the Account Activity page, you can find your account information, including subscription date, statement, Engagement numbers.

[Start Tour](#) [End Tour](#)

Current Month's Balance	Top-up Balance
0	0

REFRESH

[Next](#)

## ACCOUNT ACTIVITY

Date Joined | **August 29, 2013**

Statement Period | **Sep 01, 2014 - Oct 01, 2014**

Select Statement |

## SUMMARY

# SETTINGS > ACCOUNT ACTIVITY

## ACCOUNT ACTIVITY

Date Joined | August 29, 2013

Statement Period | Sep 01, 2014 - Oct 01, 2014

Select Statement |

## SUMMARY

Account ID | admin@soleshiok.com

Your Current Pack | TAO OF SHOP ENGAGE PREMIUM

This is your subscription start date

Previous Next

# SETTINGS > ACCOUNT ACTIVITY

## SUMMARY

Account ID | admin@soleshiok.com

Your Current Pack | TAO OF SHOP ENGAGE PREMIUM

Monthly Package Engagements |

The account ID

Previous

Next

Package Engagements for this Month	No.
Current Month's Usage	0
Current Month's Balance	0

*\* No rollover for next month's billing*



**TAO OF SHOP**  
WAY OF OMNI-CHANNEL RETAIL

# SETTINGS > ACCOUNT ACTIVITY

Account ID | admin@soleshiok.com

Your Current Pack | TAO OF SHOP ENGAGE PREMIUM

Monthly Package Engagements

The pack you're currently subscribed to

Previous Next

Package Engagements for this Month	No.
Current Month's Usage	0
Current Month's Balance	0

*\* No rollover for next month's billing*

Top-up Packs Purchased	Date	Packs	Engagements
	10 April 2014	1 Pack	500 Engagements
	20 April 2014	1 Pack	500 Engagements

- Note : Your monthly Engagements will not be rolled over to the next month

# SETTINGS > ACCOUNT ACTIVITY

**SUMMARY**

Account: [admin@soleshiok.com](mailto:admin@soleshiok.com)

Your Current Package: **TAO OF SHOP ENGAGE PREMIUM**

Monthly Package Engagements |

Package Engagements for this Month	No.
Current Month's Usage	0
Current Month's Balance	0

*\* No rollover for next month's billing*

**And the monthly package Engagements that come with this subscription**

[Previous](#) [Next](#)

# SETTINGS > ACCOUNT ACTIVITY

## SUMMARY

Account ID | admin@soleshiok.com

Your Current Pack | TAO OF SHOP ENGAGE PREMIUM

This table shows you the breakdown of your monthly package Engagements

Previous Next

Package Engagements for this Month	No.
Current Month's Usage	0
Current Month's Balance	0

*\* No rollover for next month's billing*

# SETTINGS > ACCOUNT ACTIVITY

Account ID | **admin@soleshiok.com**

Your Current Pack | **TAO OF SHOP ENGAGE PREMIUM**

Monthly Package Engagements |

Package Engagements for this Month

x No.

Current Month's Usage

**This is your current Month's Usage**

0

Current Month's Balance

[Previous](#)

[Next](#)

0

*\* No rollover for next month's billing*

**Top-up Packs Purchased**

| 10 April 2014

1 Pack

500 Engagements

| 20 April 2014

1 Pack

500 Engagements



**TAO OF SHOP**  
WAY OF OMNI-CHANNEL RETAIL

# SETTINGS > ACCOUNT ACTIVITY

Monthly Package Engagements |

Package Engagements for this Month	No.
Current Month's Usage	0
Current Month's Balance	0

*\* No rollover for next month's billing*

Top-up Packs Purchased | 10 Engagements Pack, until your next contract renewal or further notice. 500 Engagements

Top-up Engagements for this Month	No.
Current Month's Usage	0

**This is your current Month's balance, which refreshes every month. There is no rollover to the next billing month.**

**If your balance is indicated as Unlimited, this means that you are on a Unlimited Engagements Pack, until your next contract renewal or further notice.**

[Previous](#) [Next](#)



# SETTINGS > ACCOUNT ACTIVITY

Package Engagements for this Month	No.
Current Month's Usage	0
Current Month's Balance	0

*\* No rollover for next month's billing*

**Top-up Packs Purchased** | 10 April 2014    1 Pack    500 Engagements  
| 20 April 2014    1 Pack    500 Engagements

Top-up Engagements for this Month	No.
Current Month's Usage	0
Top-up Balance	1,500

**The usage**

[Previous](#)   [Next](#)

**Top-up Engagements Expiring** | 15 May 2014    1,500 Engagements

# SETTINGS > ACCOUNT ACTIVITY

## Package Engagements for this Month

Current Month's Usage

No.

0

Current Month's Balance

0

*\* No rollover for next month's billing*

### Top-up Packs Purchased

| 10 April 2014

1 Pack

500 Engagements

| 20 April 2014

1 Pack

500 Engagements

## Top-up Engagements for this Month

Current Month's Usage

No.

0

Top-up Balance

1,500

The balance

Previous

Next

### Top-up Engagements Expiring

| 15 May 2014

1,500 Engagements




TAO OF SHOP  
WAY OF OMNI-CHANNEL RETAIL

# SETTINGS > ACCOUNT ACTIVITY

Top-up Engagements for this Month	No.
Current Month's Usage	0
Top-up Balance	1,500

**Top-up Engagements Expiring** | 15 May 2014      1,500 Engagements

 Export report on all Engagements for this period

[Export Report](#)

Expiring top-up engagements, if any and the date

[Previous](#) [Next](#)

Consumer registration and views of public posts are free. Engagements are defined as : coupon downloads,click to view private posts, in-store check-in, earning and redemption of rewards.

- Note : The Top up Engagements are valid for 12 months

# SETTINGS > ACCOUNT ACTIVITY

Top-up Engagements for this Month	No.
Current Month's Usage	0
Top-up Balance	1,500

**Top-up Engagements Expiring** | 15 May 2014      1,500 Engagements



Export report on all Engagements for this period



Export Report

This is the ENGAGEMENT report based on the month selected. To export the CSV file, click on the green excel icon here.

Previous

Next


Consumer registration and views of public posts are defined as: coupon downloads, click to view private posts, in-store check-in, earning and redemption of rewards.




**TAO OF SHOP**  
WAY OF OMNI-CHANNEL RETAIL

# SETTINGS > ACCOUNT ACTIVITY

**Top-up Engagements Expiring** | 15 May 2014      1,500 Engagements

 Export report on all Engagements for this period



Consumer registration and views of public posts are free. Engagements are defined as : coupon downloads,click to view private posts, in-store check-in, earning and redemption of rewards.

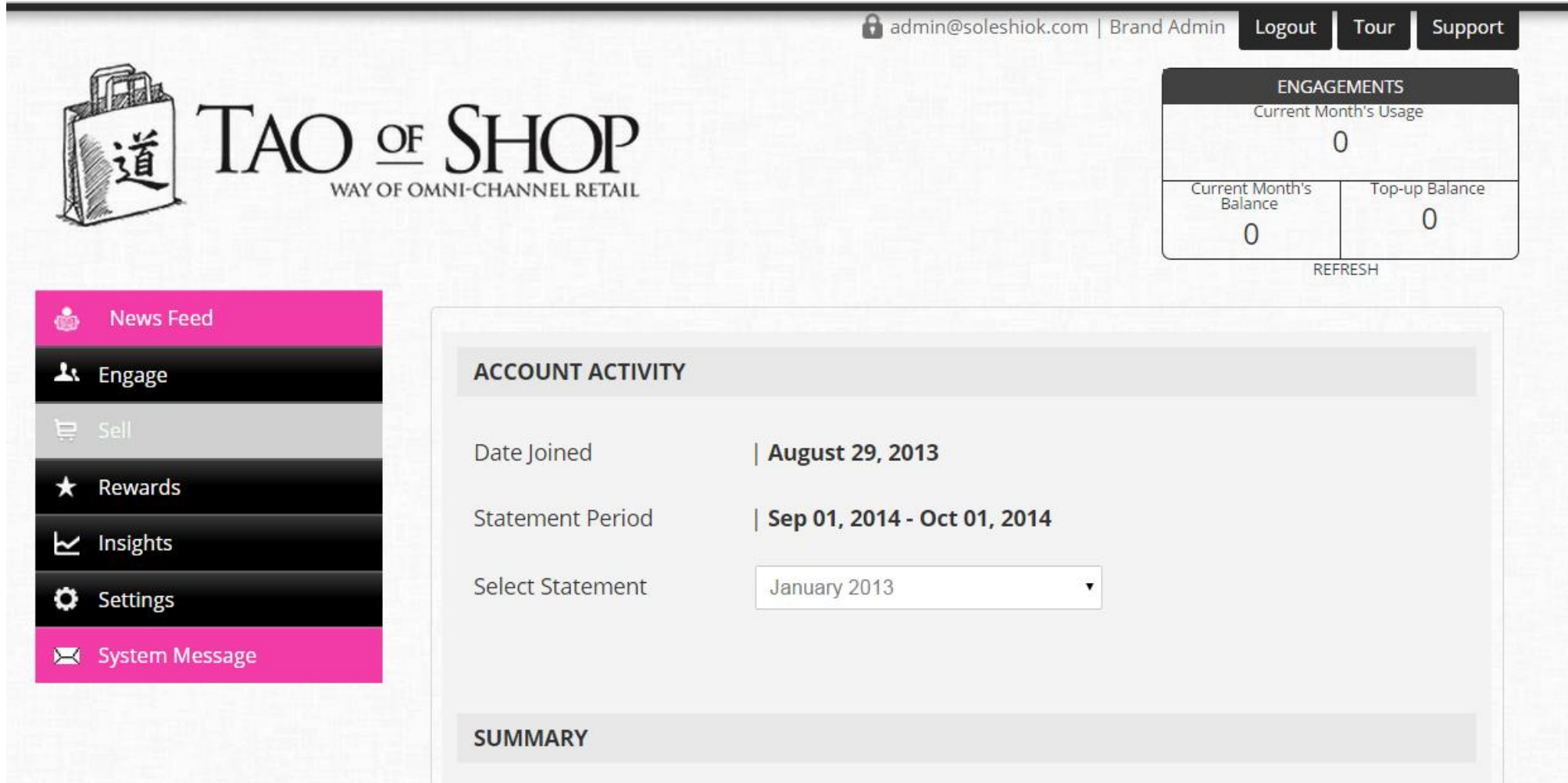
**Here's a quick definition of ENGAGEMENTs, of which your ENGAGEMENT activity numbers is based.**

[Previous](#)   [End](#)

TOS version 1.0

- We've come to the end of Settings > Account Activity. Let's proceed to System Message.

# SYSTEM MESSAGE



The screenshot displays the Tao of Shop dashboard interface. At the top right, the user is logged in as 'admin@soleshiok.com | Brand Admin' with buttons for 'Logout', 'Tour', and 'Support'. The main header features the Tao of Shop logo and the tagline 'WAY OF OMNI-CHANNEL RETAIL'. A sidebar on the left contains navigation tabs: 'News Feed', 'Engage', 'Sell', 'Rewards', 'Insights', 'Settings', and 'System Message' (highlighted in pink). In the top right corner, an 'ENGAGEMENTS' summary box shows 'Current Month's Usage' at 0, 'Current Month's Balance' at 0, and 'Top-up Balance' at 0, with a 'REFRESH' button below. The main content area is titled 'ACCOUNT ACTIVITY' and displays: 'Date Joined | August 29, 2013', 'Statement Period | Sep 01, 2014 - Oct 01, 2014', and 'Select Statement' with a dropdown menu currently set to 'January 2013'. Below this is a 'SUMMARY' section.

- Tip : System messages will automatically appear on the top navigation bar of your dashboard. You can also click on the system message tab to reopen the message

# SYSTEM MESSAGE

There is no new system message at this moment. When there is a new update, you will see this notification panel when you next log in to the dashboard.

[X]

admin@soleshiok.com | Brand Admin [Logout](#) [Tour](#) [Support](#)



ENGAGEMENTS	
Current Month's Usage	
0	
Current Month's Balance	Top-up Balance
0	0

REFRESH

- News Feed
- Engage
- Sell
- Rewards
- Insights
- Settings
- System Message

## ACCOUNT ACTIVITY

Date Joined | **August 29, 2013**

Statement Period | **Sep 01, 2014 - Oct 01, 2014**

Select Statement |

- Tip: The message can be closed at any time via the 'X' option at the top right corner.





# TAO OF SHOP

WAY OF OMNI-CHANNEL RETAIL

THANK YOU FOR USING OUR USER GUIDE.

PLEASE VISIT OUR KNOWLEDGE BASE [HERE](#).

FOR FEEDBACK, PLEASE DROP US A NOTE VIA OUR SUPPORT LINK [HERE](#)