

Spektrix + SalesVu Supplementary Setup Options

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Creating Tags to Power Discounts and Offers

Auto tags, or regular manual tags, need to be created for customers who should receive discounts and offers in SalesVu. This will most often be based on membership status, but could also be based on any other data point (such as attendance, spend, etc.)

Setting up Auto Tags in Spektrix


Auto Tags apply or remove from customer records dynamically depending on the criteria you have set. They work in the background of your system and, once set up, will continue to apply to and be removed from customer records as and when they meet the criteria.

To create a new Auto Tag, navigate to *Admin > Customers > Tags*, find the appropriate Tag Group for it to be included in and click **Add auto tag**:







This will launch the Auto Tag creator, where you'll give the Auto Tag a name and (optional) description and can start creating your Local Segments :



Tag Group

Name	Subscribers and Members
Description	
On web	<input type="checkbox"/>

 Edit

Tags in group:

Name	Description	Auto tag	
Summer Stage Subscriber		<input checked="" type="checkbox"/>	 
Annual Member		<input checked="" type="checkbox"/>	 
Lapsing Member		<input type="checkbox"/>	 

CLICK HERE  Add normal tag  Add auto tag


Auto Tag

Pre-Filter **Main-Filter**

Local Segments


Name: Annual Member

Description:

Drag segments to determine criteria:  drop here to delete

drop criteria here

CLICK HERE

 New Local Segment

Run this autotag after a customer record is created and after a transaction is confirmed

Next Cancel

This works in much the same way as [Customer List](#) creation does: select the metrics you want from the available [Segment Types](#) to set the criteria by which someone is eligible for the Auto Tag, using the **AND_OR** and **NOT** rules to tailor this further.

NOTE: Global Segments you've created for Customer Lists will **not** be available here.

You'll also have the option to choose when Spektrix applies this Tag: either the moment someone meets its criteria, or overnight. We recommend ticking the *Run this auto tag after a customer record is created*

and after a transaction is confirmed check box, as these tags will be used power Offers that patrons can be immediately eligible for once they've made a particular purchase.

Auto Tag

Pre-Filter Main-Filter

Local Segments

- Hooper
- Annual Member

Name: Annual Member

Description:

Drag segments to determine criteria:

Not Annual Member AND

OR

drop criteria here

+ New Local Segment

Run this autotag after a customer record is created and after a transaction is confirmed

Next Cancel

Example Auto Tag Segments

See below for a couple different auto tag examples that can be created to power offers within SalesVu.

Patrons who spent over a certain amount

In this example, we will create an auto tag for any patrons who have spent over \$100 at the bar in the past month. This example uses a *Purchase* segment.

Expand the *Merchandise* wrapper and pull the following metrics into the *Drop to add criteria* box (linking together using AND): *Date Transaction Confirmed*, *Returned*, and *Stock Item name*.

Date Transaction Confirmed: set to whatever time period you are looking to capture (e.g., this month)

Returned: leave unticked to specifically look for items that have not since been returned

Stock Item: Click the blue pencil and click (holding control or shift to select multiple items) the stock item name you are searching for (e.g., Bar Sales).

Once this has been completed, click next to go to the following page.

Edit Segment Information and Criteria Audit trail Usages in Customer Lists

Name: Spent \$100 at the bar this month

Description:

Criteria: Only show commonly used criteria

Order Items Memberships Merchandise Tickets Reservations Commissionable Items

Accounting Date Commission Customer Date Transaction Confirmed Individual Returned Sales Channel

Stock Item Stock Item Attributes Stock Item Name User Confirmed

Payments Held Fixed Subscriptions Fixed Subscriptions Donations

Merchandise with

Stock Item includes Bar Sales

and **Returned**

and **Date Transaction Confirmed** is This month between 12/1/2022 and 12/31/2022

AND

Drop to add to criteria

OR

Drop criteria here...

Next Cancel

This second page is where you can enter the number of items purchased and the total value of items purchased. Because we are looking for patrons who spent over \$100.00, we will enter 100.00 in the first box under *Total value of items purchased*. Leaving the second box blank will indicate to the system that we are looking for a max purchase amount of infinity.

Edit Segment **Information and Criteria** Audit trail Usages in Customer Lists

Name:

Description:

Purchasing statistics:

When data is grouped by: ▼

Total number of items purchased:

between and

Total value of items purchased:

between \$ and \$

Once entered, click save to complete your segment and drag it to the *Drop criteria here* box.

Identifying Members

In this example, we will create an auto tag for any of our members or subscribers. A customer Segment will be used to power this auto tag.

Auto Tag

Pre-Filter Main-Filter

Local Segments

- Annual Member

Name: Annual Member

Description:

Drag segments to determine criteria:

Not Annual Member AND

OR

 Run this autotag after a customer record is created and after a transaction is confirmed

Within the *Customers* wrapper, the *Memberships* metric should be dragged into the *Drop to add criteria* box. Next select which memberships you wish to add to this segment from the drop down menu and click add to add it to the criteria. If you would like to select multiple memberships, follow the same procedure of selecting the membership from the drop down menu and clicking *Add* to add them to the list.

Please note: if selecting more than one membership, be sure to change the drop down menu option from *contains all of* to *contains some of* so that the segment knows to look for any patron who has at least one of the desired memberships.

The screenshot shows the 'Edit Segment' interface with the following elements:

- Header:** 'Edit Segment' (left), 'Information and Criteria' (center), 'Audit trail' (right), 'Usages in Customer Lists' (right).
- Name:** 'Annual Member' (input field).
- Description:** (empty input field).
- Criteria:** A green box containing a list of criteria categories: 'Customers' (selected), 'Individuals', and 'Organisations'. Below these are buttons for 'Attributes', 'Avg Spend Per Order', 'Avg Spend Per Ticket', 'Contact Preferences', 'Is Primary Householder', 'Memberships', 'Tags', 'Wks Since Last Order', and 'Wks Since Last Visit'. A checkbox 'Only show commonly used criteria' is checked.
- Customers with:** A section with a red 'X' icon. It contains:
 - 'Is Active' with a checked checkbox.
 - A dropdown menu set to 'contains some of'.
 - 'and Memberships' with a dropdown set to 'is', followed by 'Annual Member' (with a red 'X') and 'Casual Membership' (with a dropdown arrow).
 - An 'Add' button with a green plus icon.
- AND:** A section with a dashed border containing the text 'Drop to add to criteria'.

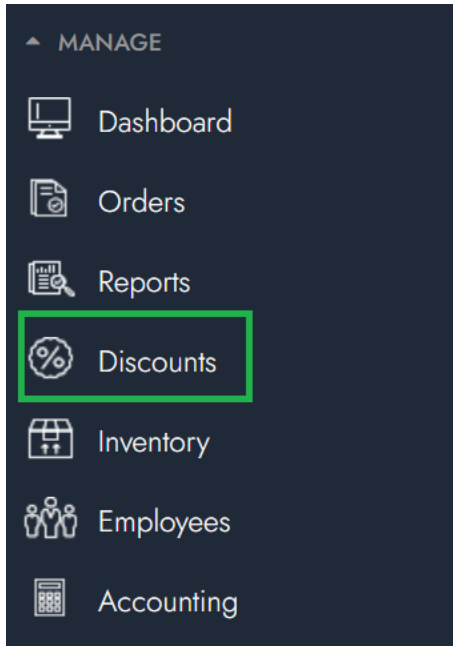
Once entered, click save to complete your segment and drag it to the *Drop criteria here* box.

Creating Offers in SalesVu Management Portal

Creating Offers in SalesVu for tagged customers in Spektrix is a two-part process that occurs within your SalesVu management portal. First, you will need to create the discount in SalesVu, then link these to the Spektrix Tags

Creating Discounts in SalesVu

From your SalesVu management portal, click *Discounts* on the left-hand panel. This will bring you to the list of available Discounts active in your SalesVu POS.



Select *Add Discount* to create a new discount.

Discounts				
Universal Arts ... ▾		Search Discount 🔍	Add Discount ▾	
+	DISCOUNT NAME	DISCOUNT TYPE	COUPON CODE	EXPIRATION DATE
	IPA discount	Non-Time Based		▾
	Gold	Non-Time Based		▾

On the following page, enter the name for the discount, its type, whether it is percentage off or an amount off, and the discount value. Once you have finished, click *continue* to bring you to the product selection page.

Discount Details	
Discount Name ⓘ	Members
Discount Type ⓘ	Non-Time Based ▾
Operator ⓘ	Percentage (%) ▾
Discount Value ⓘ	10

To learn more on how to create different discount types, please review these articles from SalesVu:

Non-time based

Time-based

Coupon Code

Customer

Select Product/Category

To apply discount to

Categories	Products
<input type="checkbox"/> WINE >	<input type="checkbox"/> Altoids
<input type="checkbox"/> BEER >	<input type="checkbox"/> Andrew Murray
<input type="checkbox"/> BEVERAGES >	<input type="checkbox"/> Beer Special
<input type="checkbox"/> TREATS >	<input type="checkbox"/> Boat Shoe IPA
<input type="checkbox"/> FOOD >	<input type="checkbox"/> Borsao Garnacha
<input type="checkbox"/> MERCH >	<input type="checkbox"/> Bottle Water

Note: "Coupon Code" discount on variable price products/services only work for "Time Slots without Service" bookings.

Here you can select which product categories, and specifically which product within each category will qualify for the discount. Once you have selected the desired categories, click Save to save this discount.

Linking Discounts to Spektrix Tags

To link the discounts, you previously created to Spektrix tags, navigate the Spektrix Integration settings portion of your SalesVu management portal. If you do not have this page bookmarked on your left-hand portal, you can find it within settings. Click the downward facing arrow on the top right to open the Spektrix Integration drop down menu. Select *Setup Spektrix Discounts*.

Settings

Payment Methods General Settings Cash Denominations Cross Device Sync Email Notifications Receipt Settings ★ Spektrix Integration

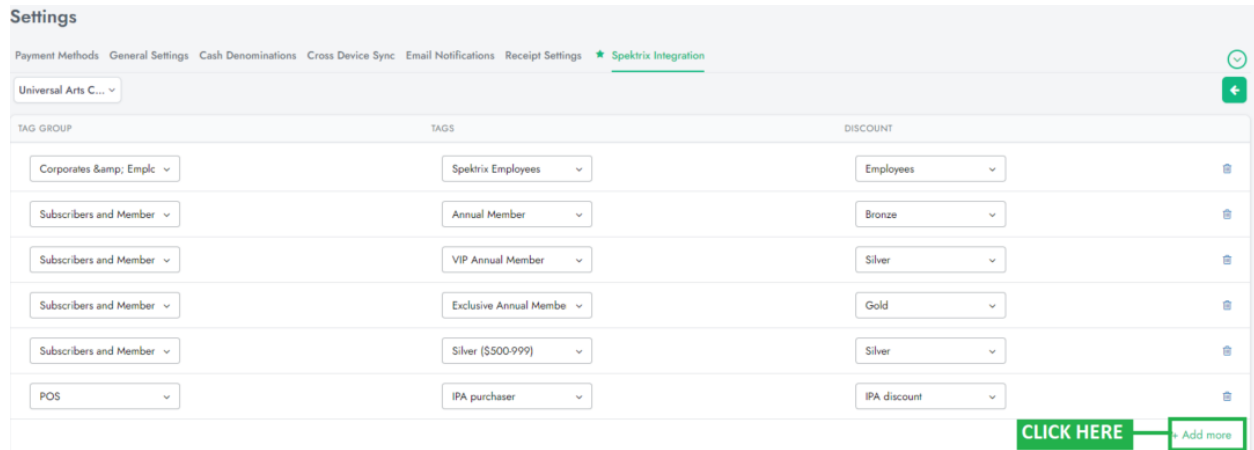
Universal Arts ... ▾

Clientname NASalesDemo2

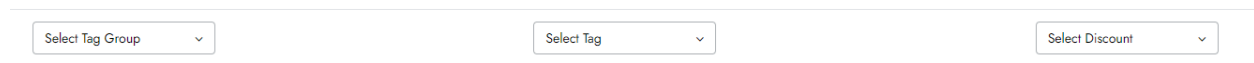
▾

Setup Spektrix Discounts

On the next page, you can find your list of Tags that have been linked to discounts. To add a new group, click the *Add more* button at the bottom of the page.



A new line will be added, and here is where you can select your tag group, tag, and discount all from their respective drop-down menus.



When you are finished, click save, and this will allow your tagged customers to receive the discounts they are eligible for.

Creating a Customer Barcode in Ticket Design

To easily enable customers to identify themselves at the SalesVu sales points, you may also choose to print customer IDs as barcodes on tickets or provide physical or digital membership cards which contain the Customer ID as a barcode.

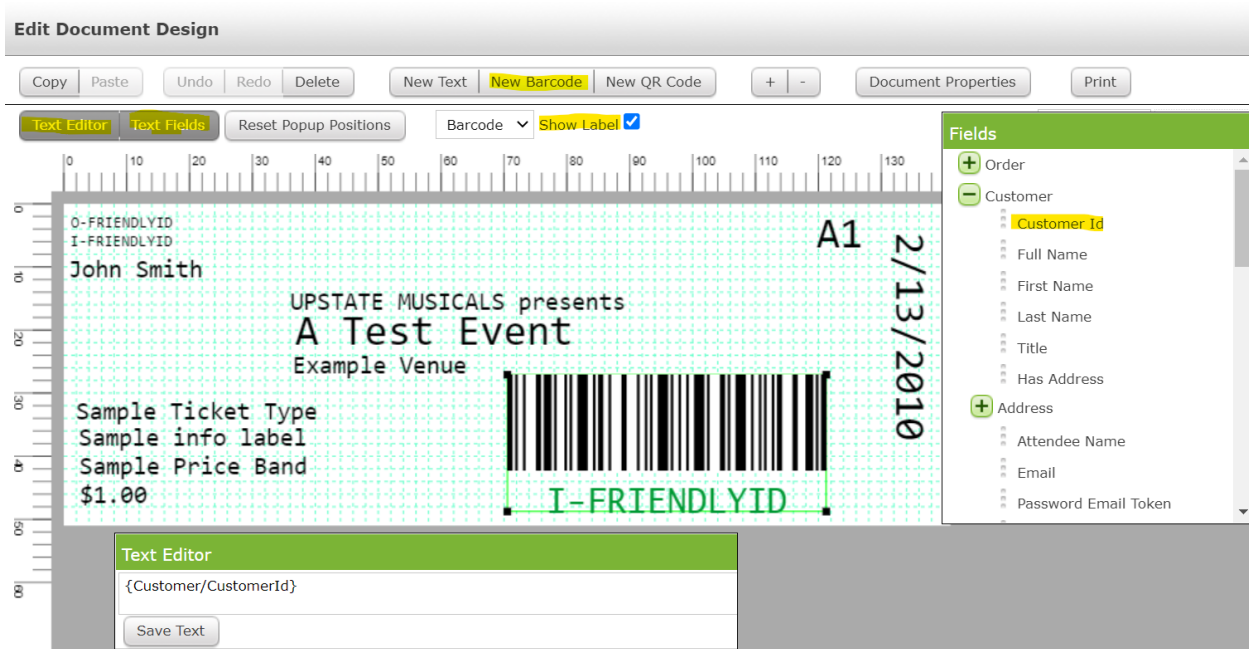
To add the customer barcode to a ticket design, navigate to *Admin > Document Designs > Tickets* select the ticket design that you are looking to add the barcode to and select the 'Edit' button.

Tickets Designs

Name	Description	
Standard		

The Document Designer will then pop up. From here, click 'New Barcode' to add a new barcode to the ticket design.

The default for barcodes is the seat information, so this will need to be edited. To do so, click on the barcode so that it is highlighted, and then click the 'Text Editor' button in the top left corner. From this pop up, you can erase the seat information that is there, and click the 'Text Fields' button next to 'Text Editor'. This will present all the available ticket designs fields. Expand the 'Customer' tab by clicking on the green plus sign next to it, and you can click and drag the 'Customer Id' field into the 'Text Editor' box.



The screenshot shows the 'Edit Document Design' window. At the top, there are buttons for 'Copy', 'Paste', 'Undo', 'Redo', 'Delete', 'New Text', 'New Barcode', 'New QR Code', '+', '-', 'Document Properties', and 'Print'. Below these are 'Text Editor' and 'Text Fields' buttons, along with 'Reset Popup Positions', 'Barcode', and 'Show Label' (checked). The main area displays a ticket design on a grid with a ruler. The ticket text includes 'O-FRIENDLYID', 'I-FRIENDLYID', 'John Smith', 'UPSTATE MUSICALS presents A Test Event', 'Example Venue', 'Sample Ticket Type', 'Sample info label', 'Sample Price Band', '\$1.00', 'A1', and '2/13/2010'. A barcode is present with 'I-FRIENDLYID' below it. A 'Text Editor' pop-up is open at the bottom, containing the text '{Customer/CustomerId}' and a 'Save Text' button. On the right, a 'Fields' panel is visible, showing a tree view with 'Order', 'Customer' (expanded), and 'Address'. Under 'Customer', 'Customer Id' is highlighted.

Additionally, you can choose to display or hide the Customer ID under the barcode by checking (or unchecking) the 'Show Label' box highlighted above. Lastly, make sure to hit the 'Save Text' button and save button on the top right corner to save these ticket design changes.