

Fullrail Campaign Rules

A breakdown of live Fullrail Campaigns for Drag & Drop UI / UX

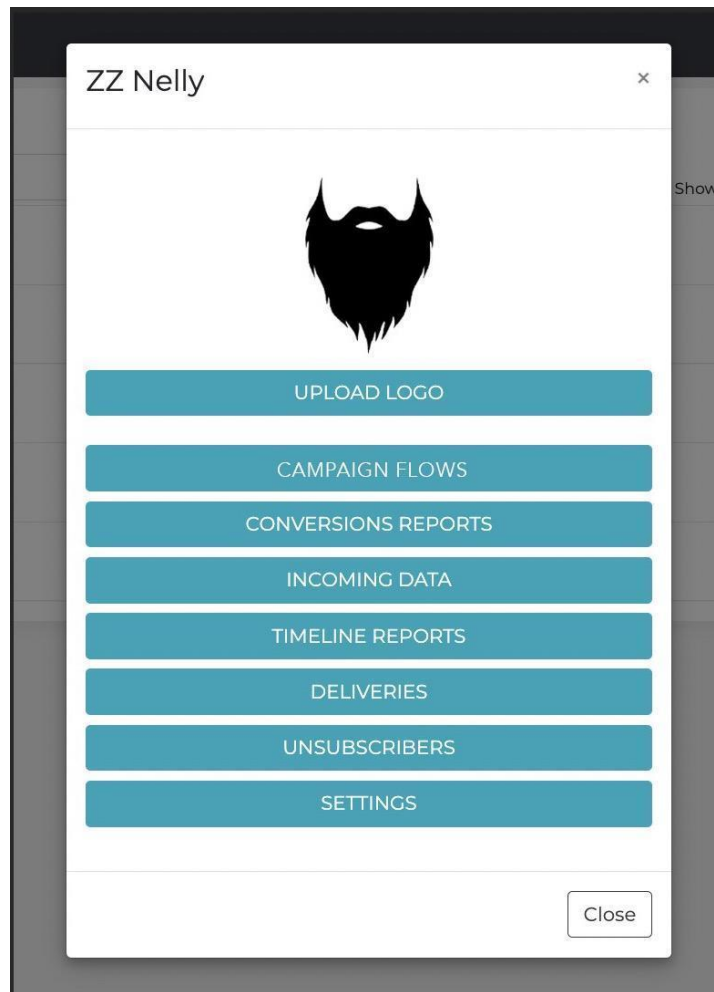
Version 1.0
05/20/2022

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Create Flow

Flows will be established on all Fullrail profiles and dictate how consumers initially move through each campaign. Admins will have access to create new flows or duplicate previous flows based on the procedures below.

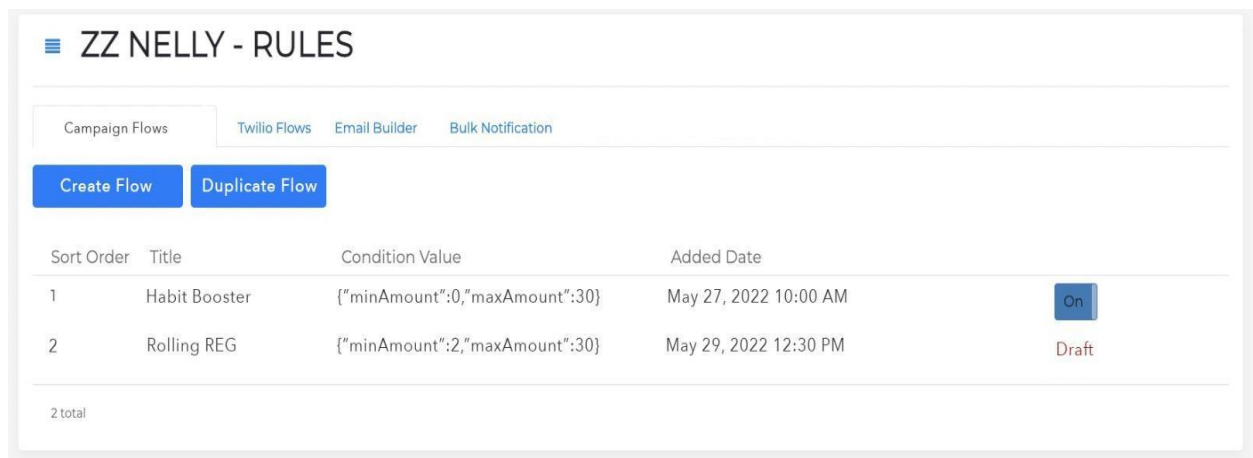
1. **Campaign Flow:** Access to the Flows dashboard



2. **Flows:** Dashboard to show all current flows, ability to toggle flows on&off, while also displaying any drafts that have been saved during flow creation

Fullrail's current Rules will be converted into Flows

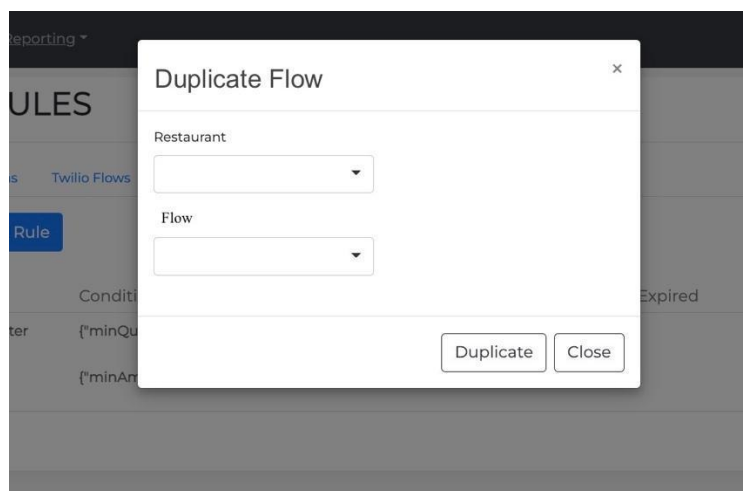
- **Create Flow**
 - o Directs admin to Drag & Drop dashboard to establish a new flow
 - o Once Flow is saved it will populate with in the list
 - Admins can select from specific flow to make edits and update content



Sort Order	Title	Condition Value	Added Date	
1	Habit Booster	{"minAmount":0,"maxAmount":30}	May 27, 2022 10:00 AM	On
2	Rolling REG	{"minAmount":2,"maxAmount":30}	May 29, 2022 12:30 PM	Draft

2 total

- **Duplicate Flow**
 - o Window allows admin to duplicate rule from additional profile

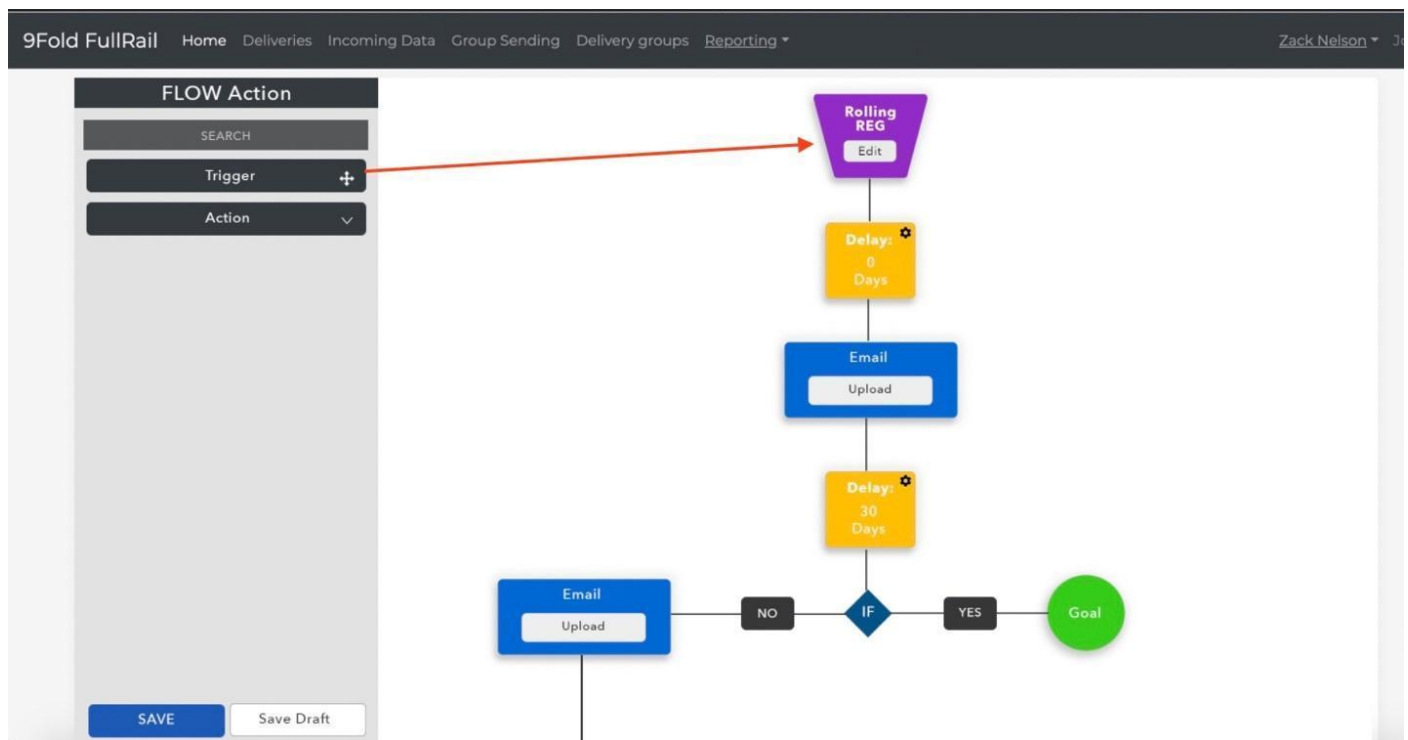


Flow Example

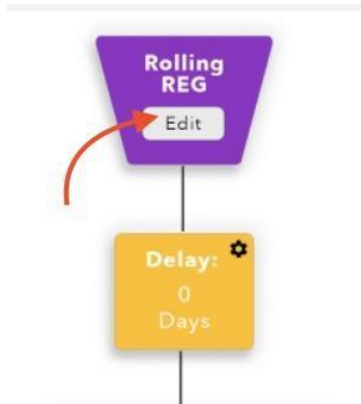
EX: Rolling REG

Rules will be established on all Fullrail profiles by dragging action items into the workspace. The action item that is dropped will connect to additional items to dictate how consumers move through each campaign. The following example shows how the Rolling REG Flow would be established:

1. **Trigger:** Ability to drag in trigger and edit
 - **Trigger Name** – Is editable but default name should be “Trigger”



2. **Edit:** Access to trigger conditions



3. **Trigger Conditions:** Window appears when “Edit” is selected.

- Customization of triggers to accommodate for current and future rules

The screenshot shows a 'Trigger Conditions' window. On the left is a form with the following fields: 'Flow Title' (text input), 'Trigger' (dropdown menu), 'What Causes A Person to Enter:' (dropdown menu), 'Delivery Group' (dropdown menu), 'Count Towards Generated Sales' (checkbox), 'Lifespan' (text input), 'Excluded Users Currently Enrolled' (checkbox), 'Date Range' (text input), and 'Date Range Open Ended' (checkbox). A blue 'SAVE' button is at the bottom. On the right is a 'Conditions' sub-window. It has a 'Filter' section with 'Last Time Ordered' and 'Frequency' (dropdown menu). Below this is a description: 'How much time has elapsed since last order was placed.' The 'Event' section has 'Between', 'VALUE', '&', 'VALUE', and 'Days' (dropdown menu). At the bottom are 'AND' and 'OR' buttons. A green '+' button is located below the 'Conditions' sub-window.

- **Additional Conditions:** When the Green + is selected additional conditions can be added
 - o Currently in Fullrail as “+ Logical”

Conditions

Filter

Number of Orders

V

Frequency

V

How many times over what period.

Event

Between

VALUE

&

VALUE

over

VALUE

Days

V

AND

OR

Filter

One Time Spend Amount

Frequency

V

How many times over what period.

Number of Orders

Amount Spent Over Time

Last Time Ordered

Ordering Platform

Order Source

ent

over

VALUE

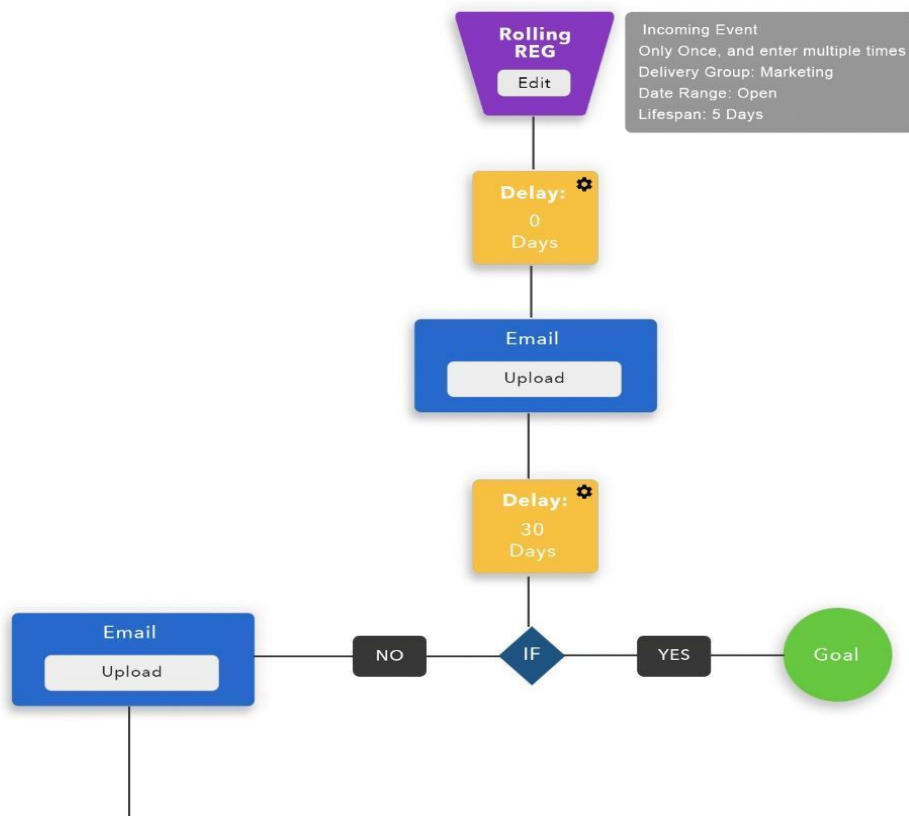
Days

V

AND

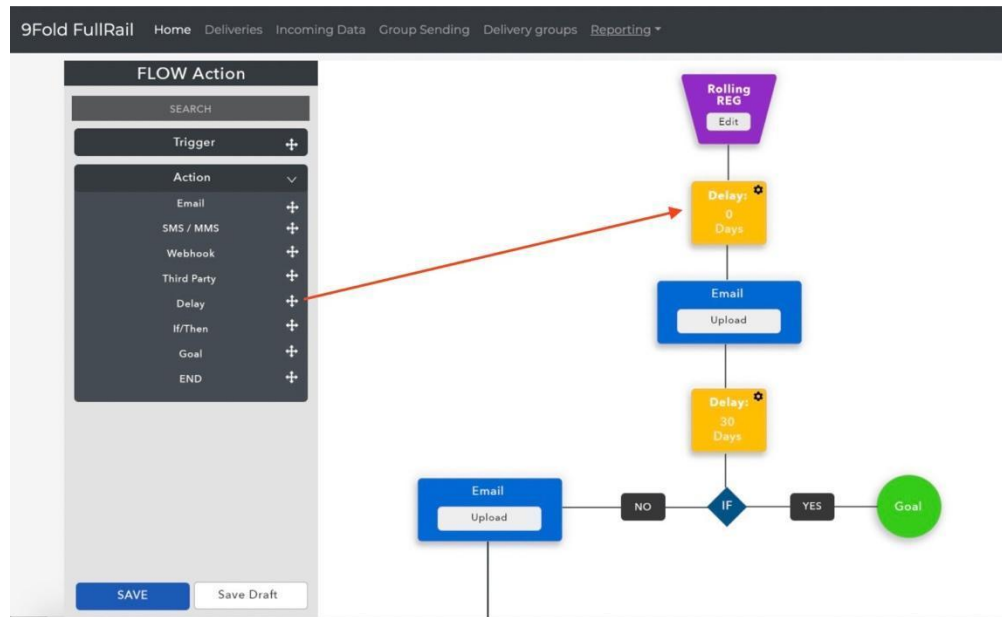
OR

- **Trigger Hover Over:** When the trigger is hovered over all information save through the window will display.



4. **Delay:** Ability to drag in Delay by dropping the Action list down

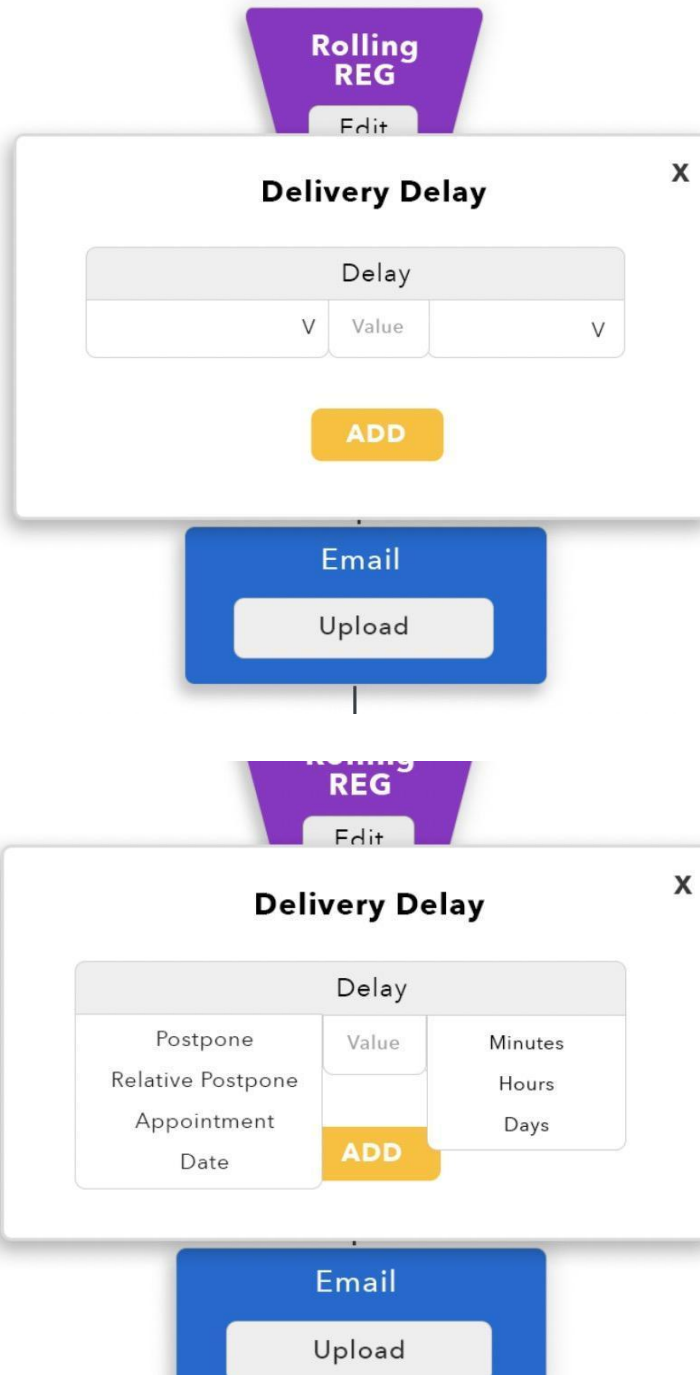
- **Default:** 0 Days from initial trigger at "Set Time" decided by team (ie. 10:00am).
- In current system we call this type of delay "postpone" as it is meant to be a time delay from initial trigger.



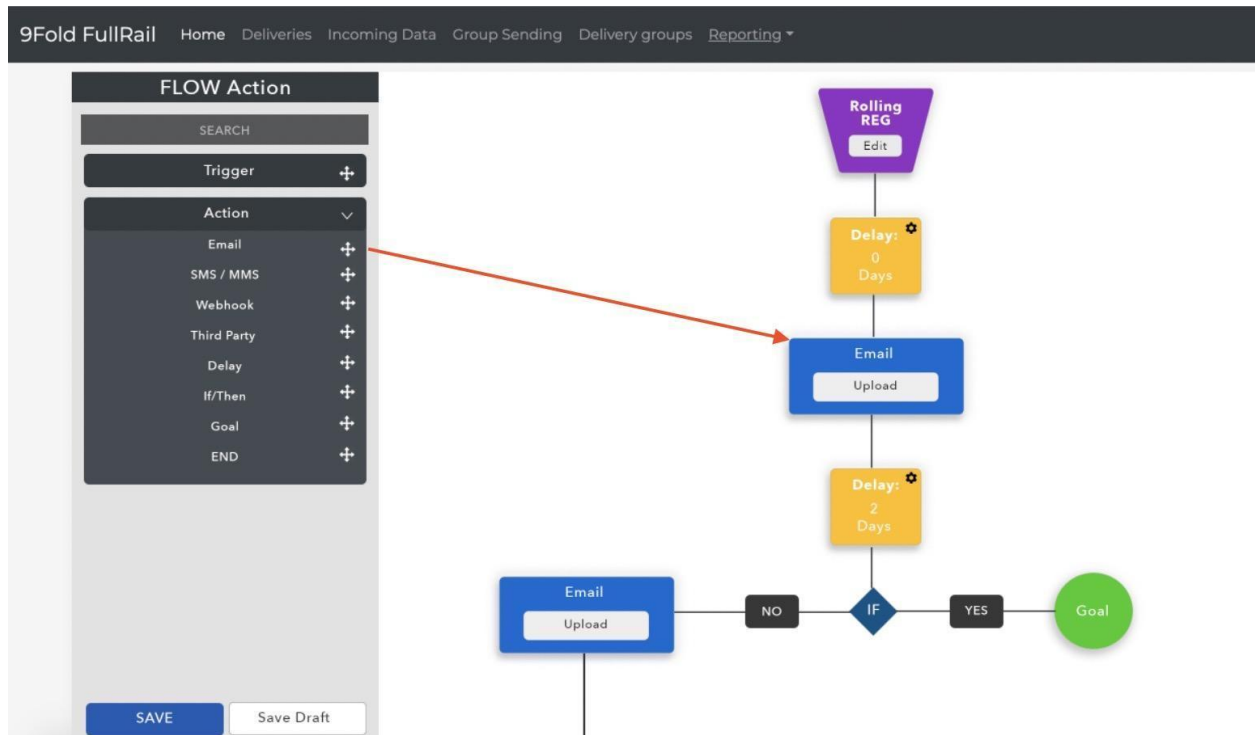
- **Setting Cog:** Access to Delivery Delay Window



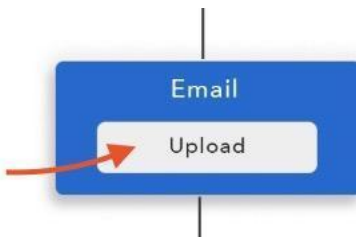
- **Delivery Delay:** Ability to establish desired settings for delay



- a. **Postpone (Default):** Time delay from initial trigger
 - b. **Relative Postpone:** Time delay from prior task
 - c. **Appointment:** Number of days but specific time (ex: 7days at 10:00am)
 - d. **Date:** Specific date and time
- **Delay Hover Over:** Required once information in added
5. **Action-EMAIL:** Ability to drag in email by dropping the Action list down and edit/upload html



6. **Upload:** A window will appear to allow customization of the Email



- a. **Subject:** The Subject Line of the email
 - i. {Restaurant.Title} needs to be dynamic
- b. **Body:** Designated HTML for Email
- c. **From:** The sender address that will show to consumers
- d. **Delivery Group:** (Optional) Depending if this differs from original Rule
- e. **Discount:** A discount ID can be added to the campaign to auto generate unique code
 - i. **Use code from previous task:** Use same discount code that was generated in the task prior

(See Image Below)

FLOW Action

SEARCH

Trigger

Action

Email

SMS / MMS

Webhook

Third Party

Delay

If/Then

Goal

END

SAVE Save Draft

Design

Subject

Yes, This Email Contains a Discount

Body

<html

xmlns="http://www.w3.org/1999/xhtml"

xmlns:v="urn:schemas-microsoft-com:vml"

From

restaurant_updates@e.hungerrush.com

Delivery Group

Discount

☐ Use code from perivious task

Save Test Email

KUNGFU NOODLE

YOU DID IT ONCE, YOU CAN DO IT AGAIN!

Order again in the next two weeks and save!

kungfunoodleplanotx.com

Restaurant.Title

(Restaurant.AddressLine1) - (Restaurant.City), (Restaurant.State) (Restaurant.Zip)

You are receiving this email because you previously ordered from (Restaurant.Title).

If you no longer wish to receive these emails, click here to Unsubscribe.

- **Selecting Discount:** Discounts & Parameters will be generated on external page (Discount Creation), while the Discount ID will be available to select from on the window.

FLOW Action

SEARCH

Trigger

Action

Email

SMS / MMS

Webhook

Third Party

Delay

If/Then

Goal

END

SAVE Save Draft

Design

Subject

Yes, This Email Contains a Discount

Body

<html

xmlns="http://www.w3.org/1999/xhtml"

xmlns:v="urn:schemas-microsoft-com:vml"

From

restaurant_updates@e.hungerrush.com

Delivery Group

Discount

Survry - 9aebaeobiaef

30 Day - cfkmb98bg2r

60 Day - jn34kn9vt0fv

90 Day - 09uefberteq

Save Test Email

KUNGFU NOODLE

YOU DID IT ONCE, YOU CAN DO IT AGAIN!

Order again in the next two weeks and save!

kungfunoodleplanotx.com

Restaurant.Title

(Restaurant.AddressLine1) - (Restaurant.City), (Restaurant.State) (Restaurant.Zip)

You are receiving this email because you previously ordered from (Restaurant.Title).

If you no longer wish to receive these emails, click here to Unsubscribe.

- **Use Code from Pervious Task:** When selected the discount field will become read only and use the discount code that was generated from the pervious task.
 - o Allows consumers to receive identical codes within a campaign

Design

Subject
Yes, This Email Contains a Discount

Body
<html>
xmlns="http://www.w3.org/1999/xhtml">
xmlns:v="urn:schemas-microsoft-com:vml">

From
restaurant_updates@e.hungerrush.com

Delivery Group
V

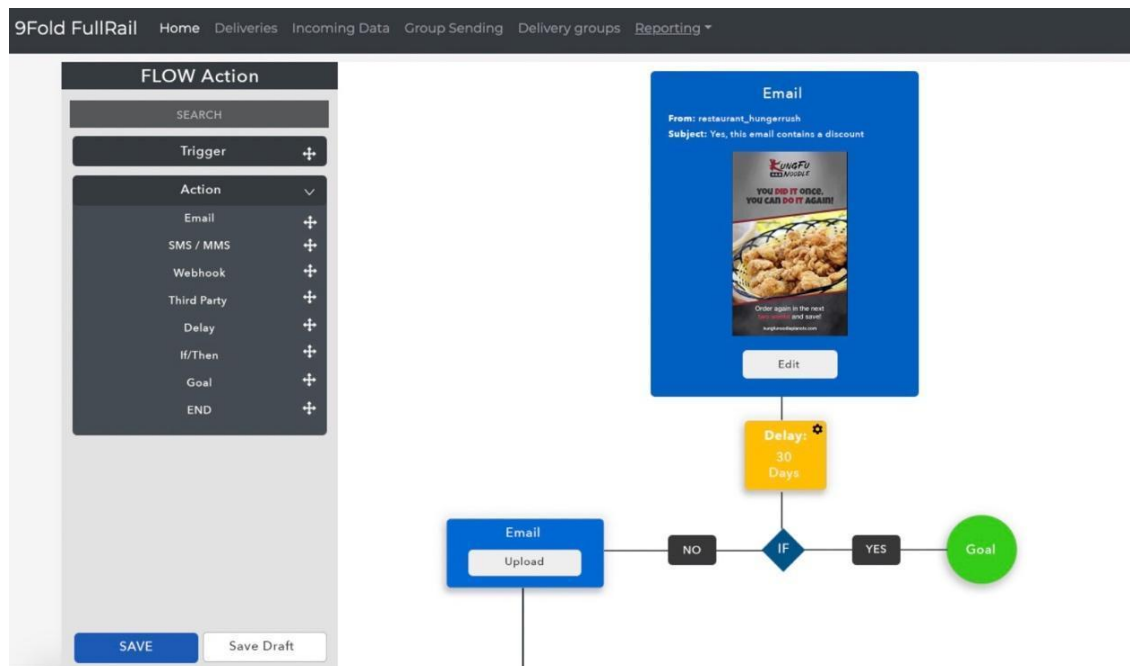
Discount
V

☒ Use code from pervious task

Save **Test Email**

Preview:
KUNGFU HAD NOODLE
YOU DID IT ONCE, YOU CAN DO IT AGAIN!
Order again in the next two weeks and save!
kungfunoodleplanox.com
Restaurant Title:
(Restaurant.Address.Line1) - (Restaurant.City),
(Restaurant.State) (Restaurant.Zip)
You are receiving this email because you previously
ordered from (Restaurant.Title).
If you no longer wish to receive these emails, click here to
Unsubscribe.

- **Save:** Once the uploaded HTML is saved it will display within the flow
 - o **Preview:** A preview will display within the flow to detail From, Subject Line, and HTML.
 - o **Edit:** When selected the original window will appear to allow editing.



7. The uploaded Email becomes **Task 1** of the Rolling REG Campaign
- a. Additional tasks to follow would start at Task 2, Task 3, etc.

DESIGN TEST 9 - DELIVERIES

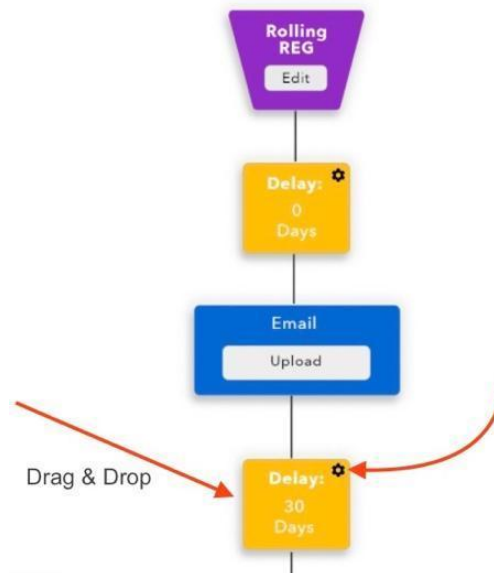
Total: 56
Today: 0
This week: 0
Filters: **ADD**

Type to search...

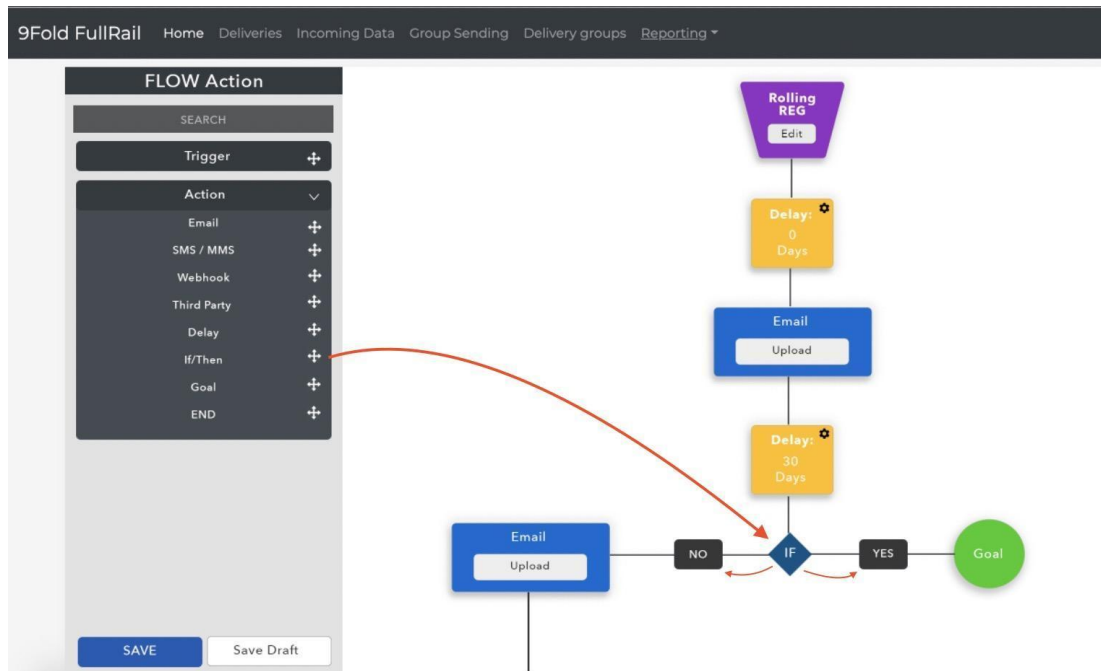
REFRESH
EXPORT

Id	Restaurant	Customer	Rule	Task	Action	Status	Added Date	Scheduled Date	
11730166	Design Test 9	Vitaliy... Zaterka...	RollingREG	Task 3	Email	Sent	May 11, 2022 10:01 PM	May 13, 2022 10:01 PM	👁
11678469	Design Test 9	Vitaliy... Zaterka...	RollingREG	Task 1	Email	Sent	May 11, 2022 10:01 PM	May 11, 2022 10:01 PM	👁
11704934	Design Test 9	Vitaliy... Zaterka...	RollingREG	Task 2	Email	Sent	May 11, 2022 10:01 PM	May 12, 2022 10:01 PM	👁

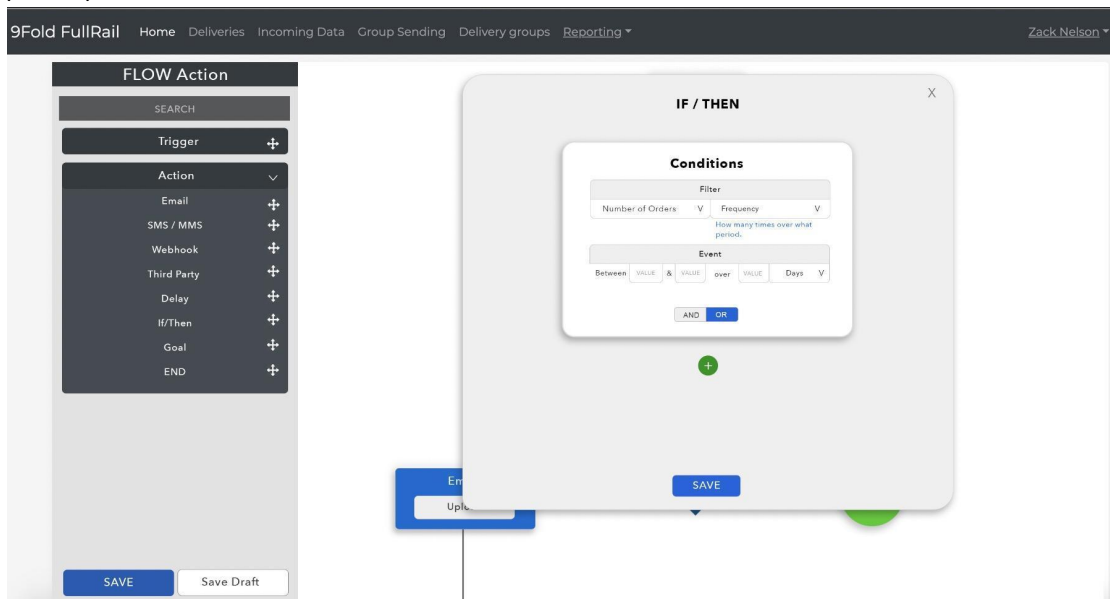
8. **Delay 30 Days:** Indicates that the “Delay” action was dragged into the flow
- **Setting Cog:** The settings were established to delay the flowing action by 30days



9. **If/Then:** Ability to drag in If/Then statements. “NO” & “YES” must be incorporated to direct consumers through the campaign.
- If the consumer had placed order at any time during the delay since the previous task was executed, THEN we would push the consumer to the RIGHT. If consumer had not placed any orders during the delay period, THEN we would push consumer to the LEFT

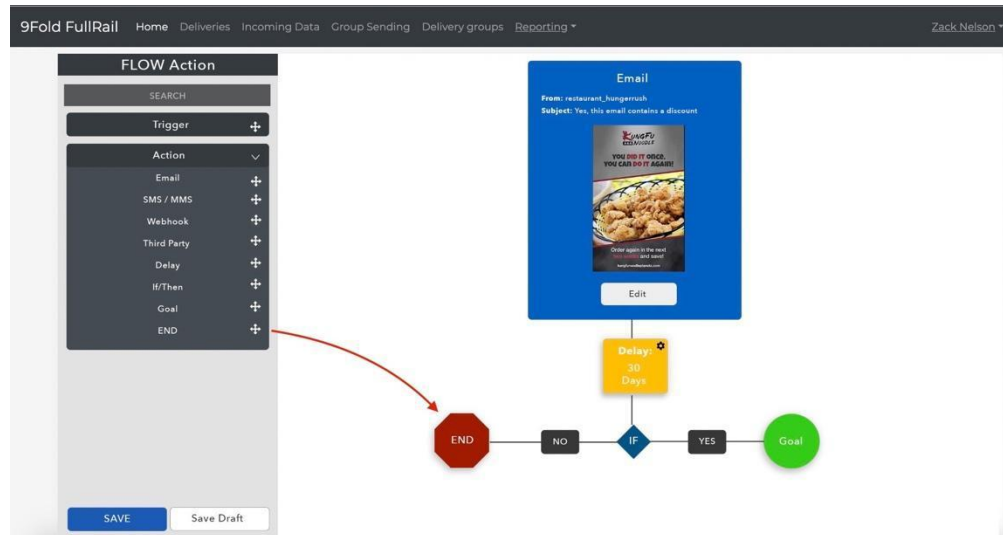


- **Selecting “IF”:** The capability to add conditions to the IF/Then statement is required to move to complete the flow. This can be done by selecting the IF icon to open the Conditions window (below). *Full*



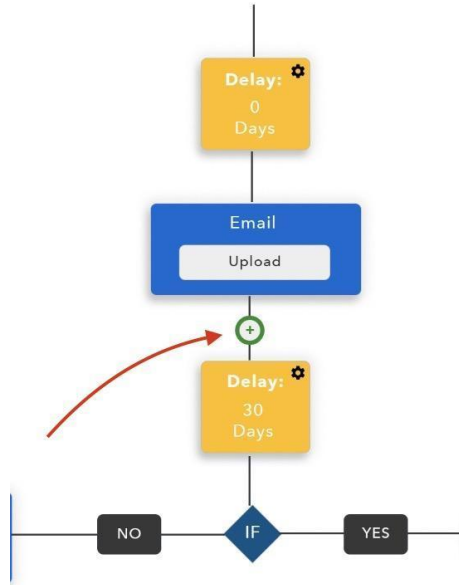
walkthrough of Condition Window found in Page Breakdown

10. **End Flow:** The full Rolling REG campaign will be developed using drag & drop. Once all sequences are completed “END” is dragged in to finish the flow.

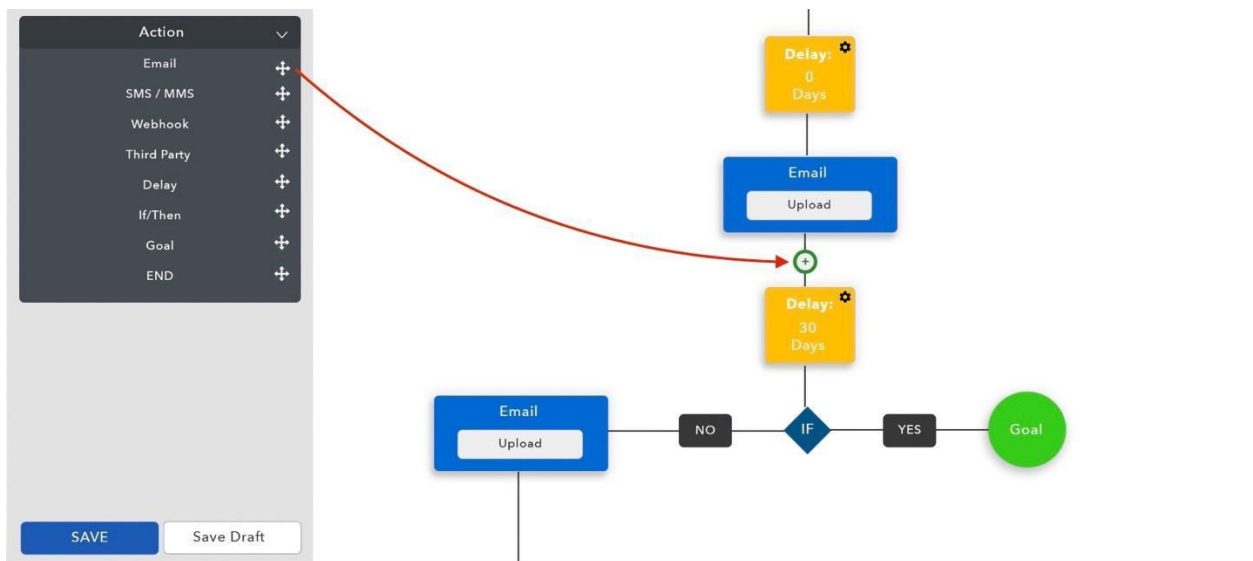


Add Action

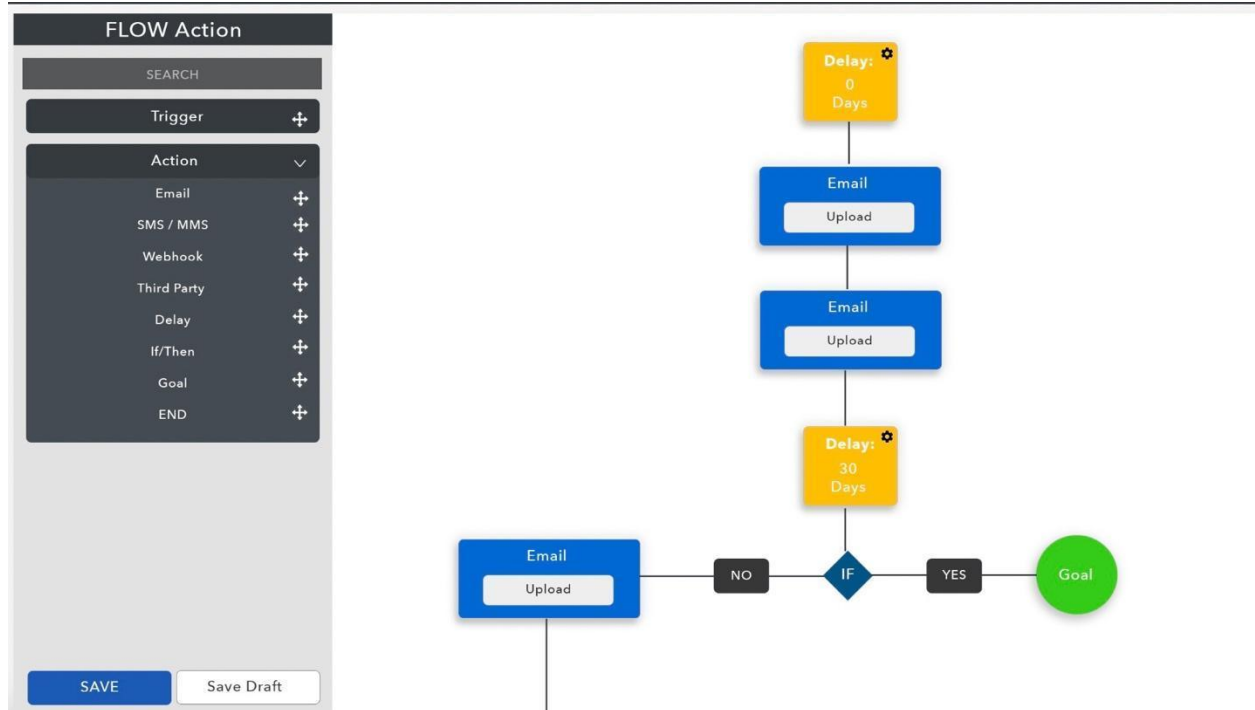
1. **Add:** Additional actions can be added between tasks once the flow has been generated.
- **Hover Over:** When a cursor hovers over the line between action items a Green “+” will appear.



- **Drag & Drop:** Actions can be dragged into this “+” to add to the flow

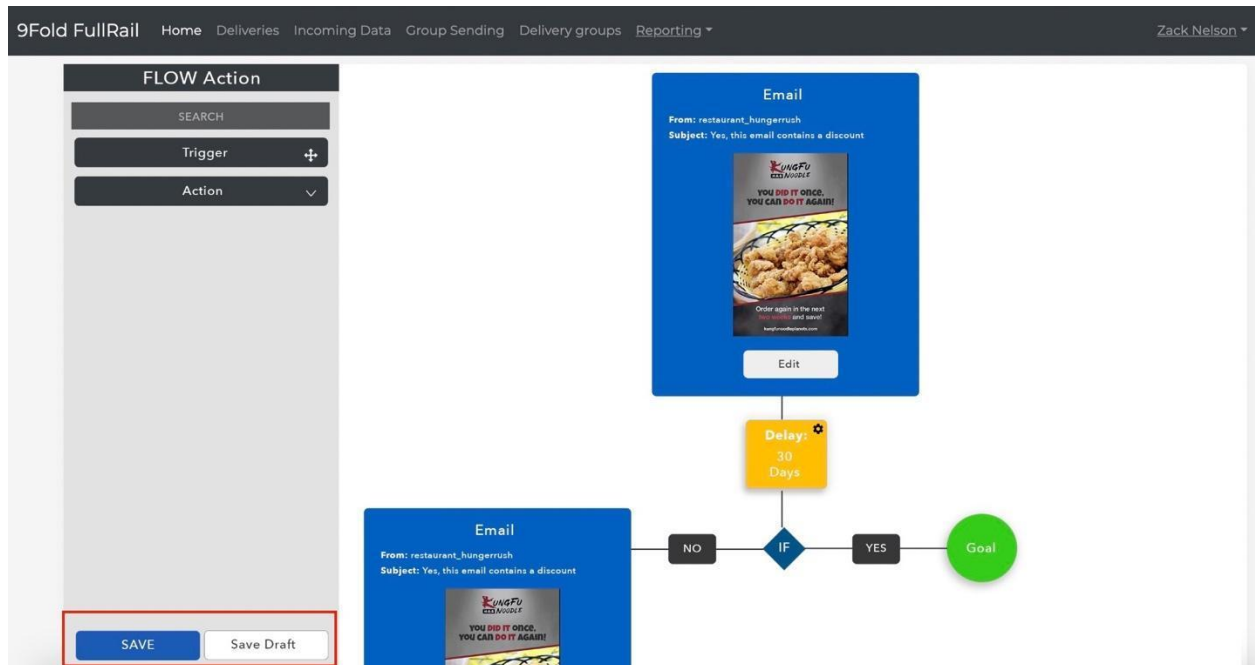


- **Additional Action:** Actions is now available where Green “+” was previously

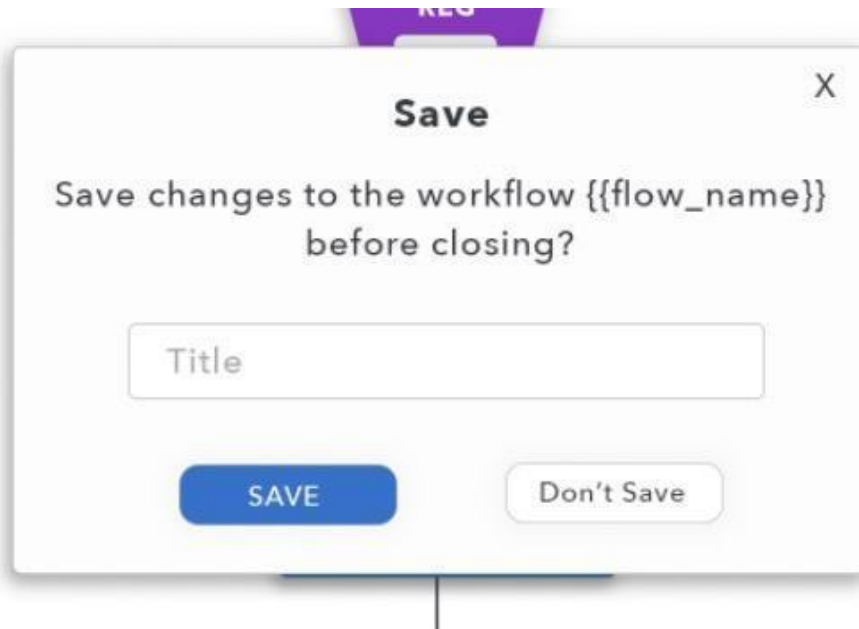


Save Flow

1. **Save:** Once a flow is saved it will populate on the Campaign Flow Dashboard



2. **Save Window:** Upon selecting “Save” a window will appear to allow users to name designated flow.



- **Save Draft:** A draft can be saved when the flow has yet to be completed. This will be flagged on the Campaign Flow Dashboard.
 - If possible, all drafts should be saved upon exiting the flow
 - Save Draft button is an alternative option if the above is not possible

ZZ NELLY - RULES

Campaign Flows

Twilio Flows

Email Builder

Bulk Notification

Create Flow

Duplicate Flow

Sort Order	Title	Condition Value	Added Date	
1	Habit Booster	{"minAmount":0,"maxAmount":30}	May 27, 2022 10:00 AM	On
2	Rolling REG	{"minAmount":2,"maxAmount":30}	May 29, 2022 12:30 PM	Draft

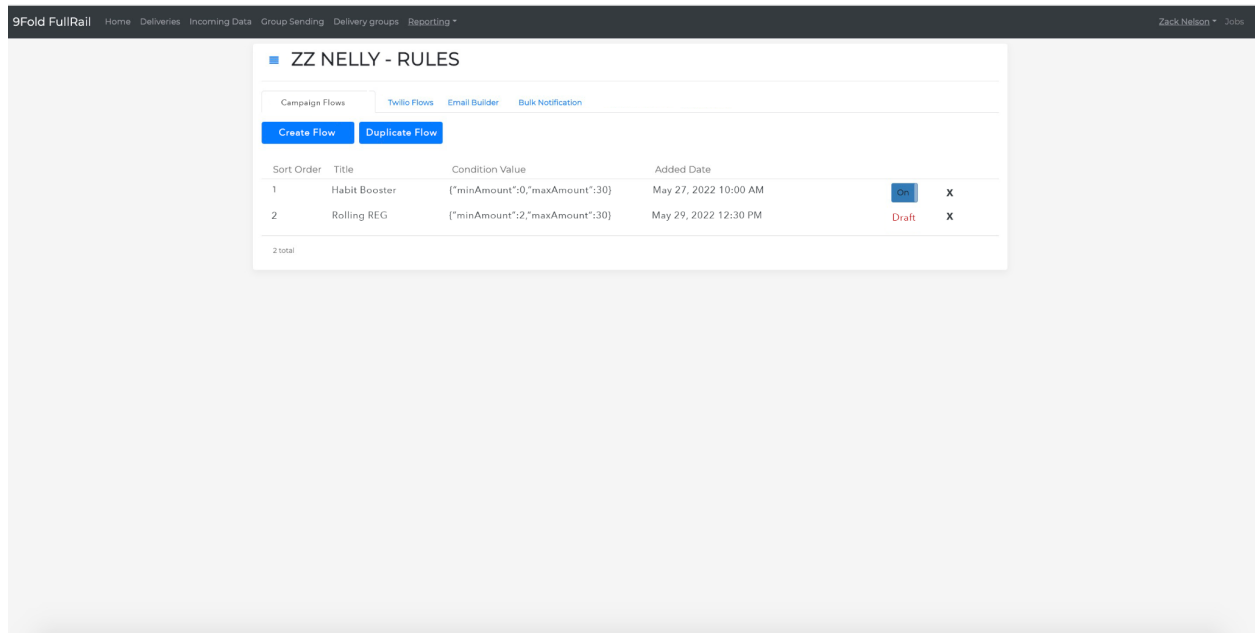
2 total

Pages Breakdown

1. Campaign Flows Dashboard:

- "CAMPAIGN FLOWS" Dashboard will replace "Rules"
- On the Dashboard:

- i. “Campaign Flows” will be replacing: Rules, Reminders, Campaign and Engagement Flows
- ii. Create Flow - sends user to drag & drop dashboard
- iii. Duplicate Flow - Recreate flow from another profile
 1. Must clear tasks for new upload (email / sms)
- iv. Select Flow:
 1. By selecting a flow from the list the user will be brought to the drag & drop dashboard showing current flow
- v. Toggle On / Off

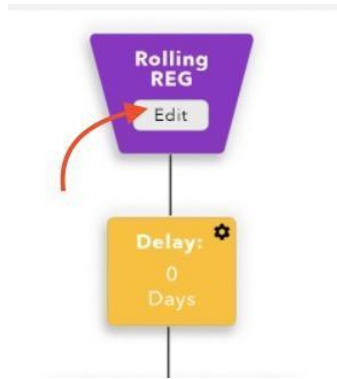


Mockup Link: <https://drive.google.com/file/d/1kFtnJzHrSlzhoujG7pINnU2-y8vjRSgl/view?usp=sharing>

2. Create Flows Dashboard (Drag & Drop):

a. Tigger

- i. Start of all flows - What causes a consumer to enter the campaign



b. Edit - Trigger Window

The screenshot shows the 'Edit - Trigger Window' in the 9Fold FullRail application. The interface has a dark header with navigation links: Home, Deliveries, Incoming Data, Group Sending, Delivery groups, and Reporting. The user's name 'Zack Nelson' and a 'Jobs' link are on the right. On the left, a 'FLOW Action' sidebar lists various actions: Trigger, Email, SMS / MMS, Webhook, Third Party, Delay, If/Then, Goal, and END. The main area contains a form for configuring the trigger. It includes fields for 'Flow Title', 'Trigger', 'What Causes A Person to Enter:', 'Delivery Group', 'Count Towards: Generated Sales' (with a 'Lifespan' field), 'Excluded Users Currently Enrolled', and 'Date Range'. There are checkboxes for 'Count Towards: Generated Sales' and 'Excluded Users Currently Enrolled', and a checkbox for 'Date Range Open Ended'. A 'Conditions' modal is open, showing 'Number of Orders' with 'From' and 'To' fields, and a 'during last' field followed by 'days'. The modal has 'AND' and 'OR' buttons and a green plus icon. At the bottom of the form are 'SAVE' and 'Save Draft' buttons.

i. Flow Title

1. The overall name of the flow
2. This name will show as the "Title" on the campaign flow dashboard

The diagram shows a single input field with the placeholder text 'Flow Title'.

ii. Tigger:

Trigger
Incoming Event
Condition is Met

- Incoming Event: Transactional events such as sending order "thank you" or telling a customer they've just placed their 10th order for the month
- Condition is Met: Triggered off of customer history such as sending to customers who've not ordered in awhile or those that enrolled in a past offer

iii. What Causes a Person to Enter:

What Causes A Person to Enter:
Only once, and enter one time only
Only once, and enter multiple times
More than once, and enter multiple times

- Only once, and enter one time only: [Habit Booster](#)
- Only once, and enter multiple times: [Rolling REG](#)
- More than once, and enter multiple times: [Birthdays](#)

iv. Delivery Group:

Delivery Group

Marketing

Survey

Add Group +

- Marketing: (Default) Establishes the flows delivery group as Marketing
- Survey: Establishes the flows delivery group as Survey
- Add Group +: When a new delivery group needs to be created. Window should appear to establish & save new groups.

v. Count Towards Generate Sales:

Count Towards Generated Sales

Lifespan

Minutes

Hours

Days

- Lifespan: Establishes the timeframe for accumulating marketing related sales.
 - Example: Campaign is established with a 5 Day Lifespan
 - Customer A placed an order 4 days after the campaign, therefore inside Lifespan. Sales do count towards marketing sales.
 - Customer B placed an order 6 days after the campaign, outside of Lifespan. Sale does not count towards marketing sales.
- Left-hand Toggle: Allows users to turn off function
 - Default: Active

vi. Excluded User Currently Enrolled:

- Dropdown: Allows users to exclude consumers who are currently enrolled in the select flows
- Left-hand Toggle: Allows users to turn off function

Excluded Users Currently Enrolled

Menufy Habit Booster

Menufy Rolling REG

vii. Date Range:

- **Calendar Dropdown:** When a user selects the date range window a calendar will need to show to allows users to specify a date range for specific flow.
- **Date Range Open Ended:** Ability to keep date range open
 - Default: Active

The image shows a UI component for selecting a date range. It consists of a light gray rounded rectangle with the text "Date Range" centered in its top half. Below this is a white rectangular input field. Underneath the input field is the text "Date Range Open Ended" followed by an unchecked checkbox.

viii. Conditions:

- **One Time Spend Amount - Frequency:**
 - **Event:** Range of Dollar amount to dollar amount

Conditions

Filter

One Time Spend Amount

Frequency

V

Consumer spending range

Event

VALUE

to

VALUE

AND

OR

+

END

- **One Time Spend Amount - Exact:**
 - **Event:** [Exact dollar amount](#)

Conditions

Filter

One Time Spend Amount

Exact

V

Precise amount spent

Event

Exactly

VALUE

dollars

AND

OR

+

- **Amount Spent Over Time - Frequency:**
 - **Event:** [Dollar to Dollar over time period](#)

Conditions

Filter					
Amount Spent Over Time	Frequency	V			
How much spent over a period of time.					

Event					
VALUE	to	VALUE	over	VALUE	Days V

AND
OR

+

- **Amount Spent Over Time - Exact:**
 - **Event:** [Exact Dollar over time period](#)

Conditions

Filter					
Amount Spent Over Time	Exact	V			
Precise amount over specific time duration.					

Event					
Exactly	VALUE	over	VALUE	Days	V

AND
OR

+

- **Last Time Ordered - Frequency:**
 - **Event:** [Ordered over time period](#)

Conditions

Filter				
Last Time Ordered	Frequency	V		
How much time has elapsed since last order was placed.				

Event				
Between	VALUE	&	VALUE	Days V

AND
OR

+

- **Last Time Ordered - Exact:**
 - **Event:** Exact amount of time order was placed

Conditions

Filter				
Last Time Ordered	Exact	V		
Precise amount of time				

Event				
Exactly	VALUE		Days	V

AND
OR

+

- **Number of Orders - Frequency:**
 - **Event:** Between order range over time period

Conditions

Filter	
Number of Orders	V
Frequency	V

How many times over what period.

Event	
Between	VALUE
&	VALUE
over	VALUE
Days	V

AND OR

+

- **Number of Orders - Exact:**
 - **Event:** Exact order amount over time period

Conditions

Filter	
Number of Orders	V
Exact	V

Precise amount over specific time duration.

Event	
Exactly	VALUE
over	VALUE
Days	V

AND OR

+

- AND/OR:

- Green +: Logical - Ability to add additional conditions to original

Conditions

Filter

Number of Orders V Frequency V

How many times over what period.

Event

Between VALUE & VALUE over VALUE Days V

AND OR

Filter

One Time Spend Amount
Number of Orders
Amount Spent Over Time
Last Time Ordered
Ordering Platform
Order Source

Frequency V

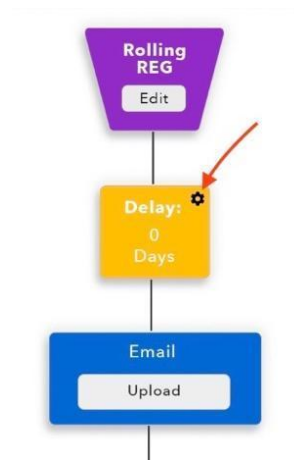
How many times over what period.

ent

over VALUE Days V

AND OR

c. Delay



Edit

Delivery Delay X

Delay		
Postpone	V	Value
		Minutes
		Hours
		Days

ADD

- **Postpone (Default):** Time delay from initial trigger

Edit

X

Delivery Delay

Delay		
Relative Postpone V	Value	Minutes Hours Days

ADD

- **Relative Postpone:** [Time delay from prior task](#)

Edit

X

Delivery Delay

Delay			
Appointment V	Value	10:00	AM

ADD

- **Appointment:** [Number of days but specific time \(ex: 7days at 10:00am\)](#)

Delivery Delay

X

Delay

Date

V

Date

10:00

AM

< June 2022 >

Sun	Mon	Tue	Wed	Thu	Fri	Sat
29	30	31	1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	1	2
3	4	5	6	7	8	9

- **Date:** [Specific date and time](#)

Action UI

1. FLOW Actions

FLOW Action

SEARCH

Trigger

Action

Email

SMS / MMS

Webhook

Third Party

Delay

If/Then

Goal

END

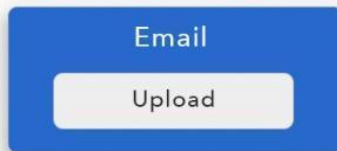
SAVE

Save Draft

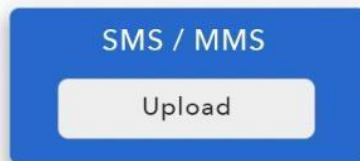
2. Trigger:



3. Email:



4. SMS / MMS



5. Webhook



6. 3rd Party



7. Delay



8. If / Then



9. Goal



10. END

