Mobiz

User Guide

Contents

Step-by-step guide

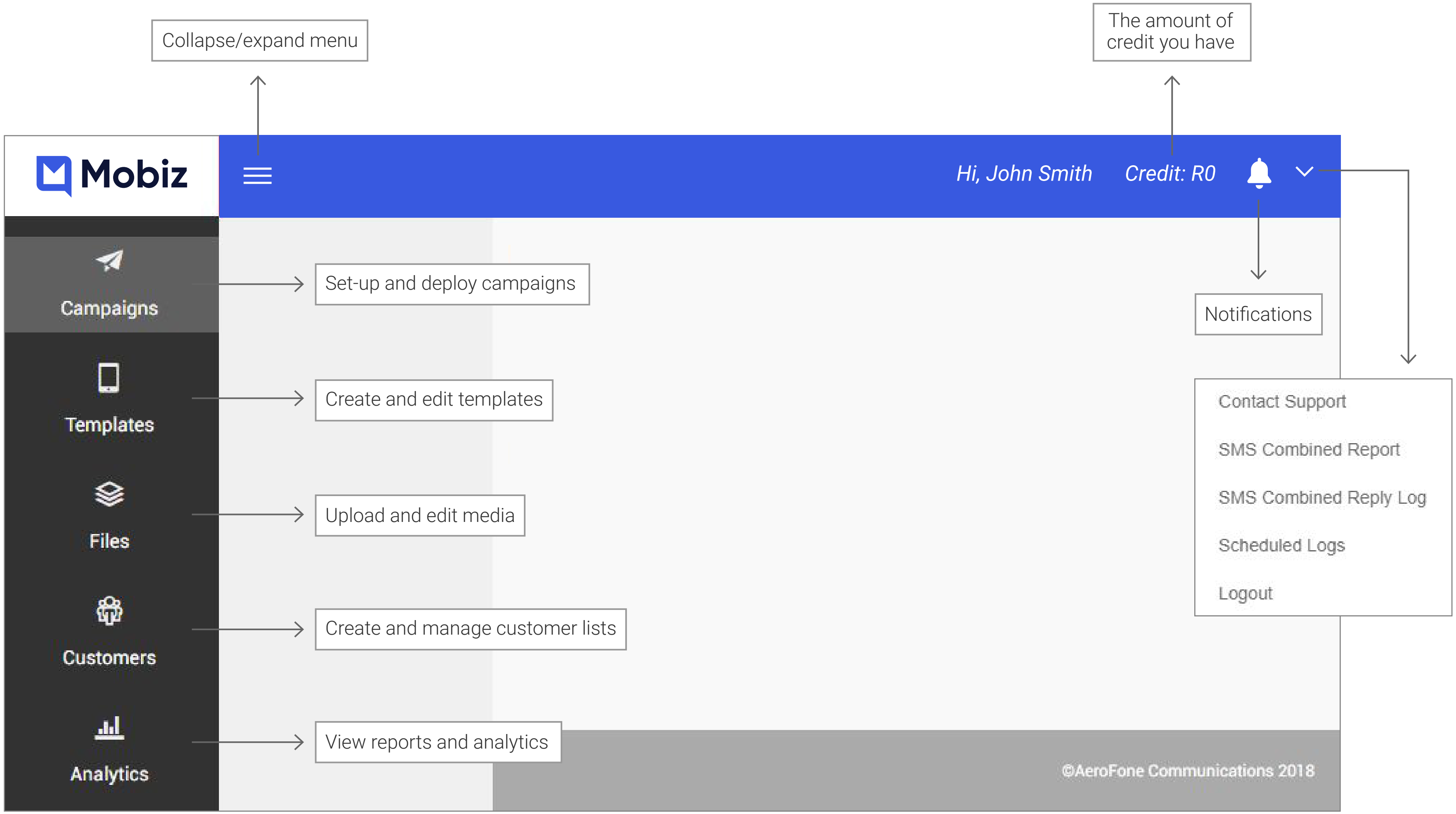
This is a guide and not a manual, simply because we don't all approach a problem the same way. This document is meant to guide you through the process of setting up an engagement, but it also allows you to navigate and use the system in a way that makes sense to you.

There are many different way to create your engagement. You can follow the step by step guide or start with step 2 then move to step 3 or start with step 3. Ultimately it will all lead to the same outcome which is step 4.

The reason for this guide is to give new users a complete overview of how the engagement is put together. For our existing customers, we have made the guide modular in order for you to skip the steps you know and jump straight to the section you need help with, but also there might be features which you are not aware of and can easily implement in your current campaigns.

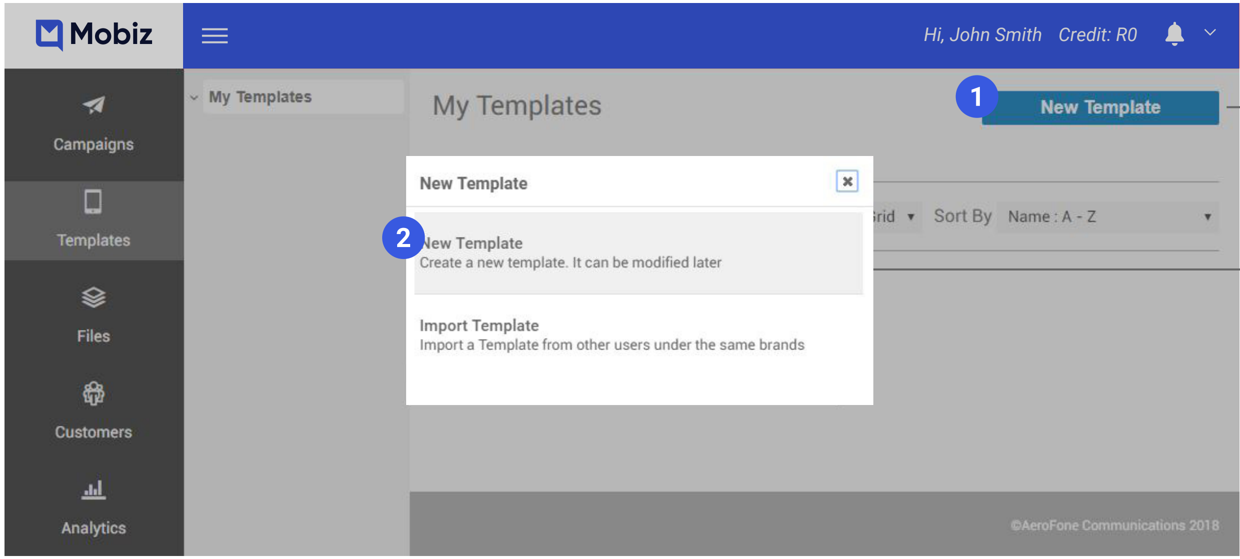
Interface

Get to know the Mobiz interface.



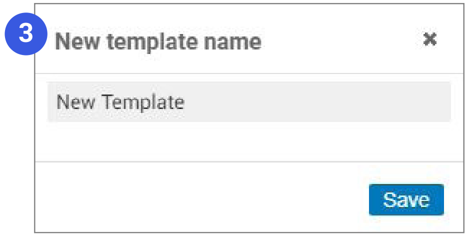
Create template

Follow the steps below to create a new template. Once you have created your new template, click 'Edit this template' to start adding content.



Click on New Template

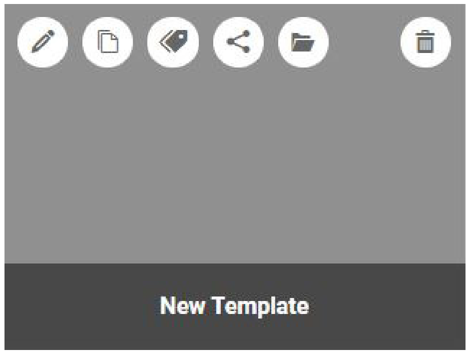
Select New Template



Give your new template a name and click Save.

Template options

Hover over the template to display the different options.



Edit this template

Make a copy of this template

Rename this template

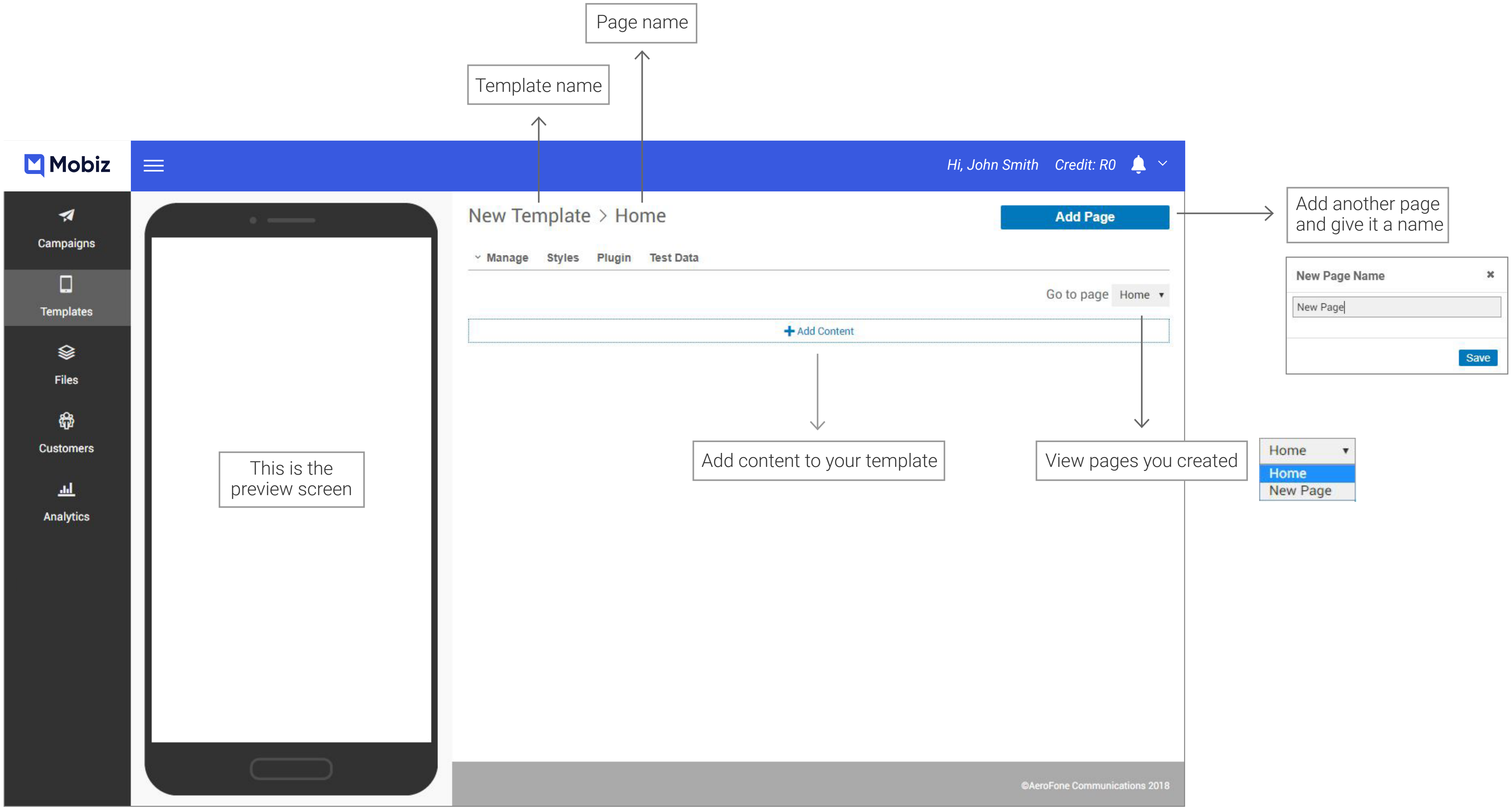
Send this template to another user

Move this template to a folder

Delete this template

Template dashboard

In the template interface you can start adding content to your template using the different available features.



Template dashboard

Customise the look of your template and test your data using the template options.

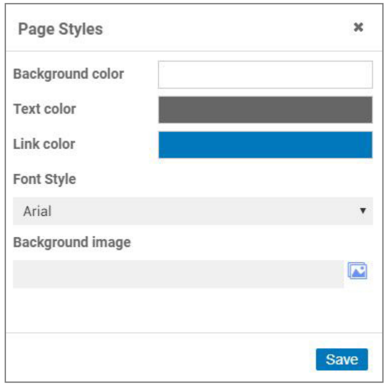
Test the tags on your template and see how it will look to different customers

See page 20 to learn about tags

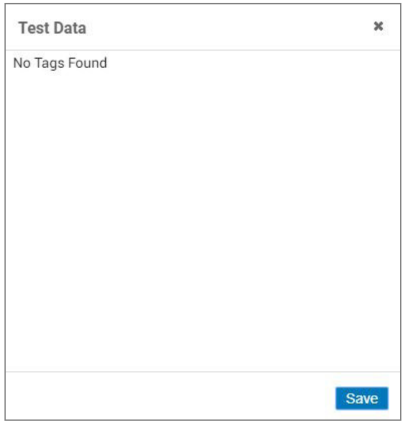
Rename the page you are currently on

Customise your template by adding your own features using code

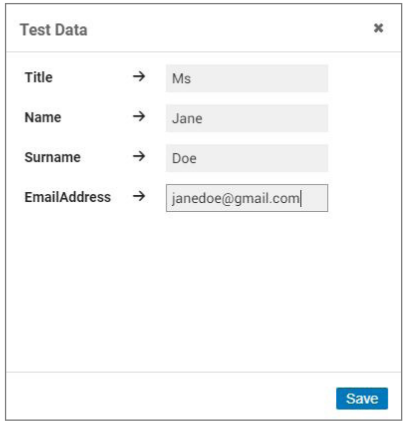
Change the colours and fonts and add a background image of all the pages in your template



Tip: Design your background image to be 800 x 1400px to ensure nothing is cut off



This is how the 'Test Data' dialogue will appear with no tags in your template



This is how the 'Test Data' dialogue will appear with tags in your template. Add in the data to see how the template will appear to different customers

Add content

Image: Add a static image located on your computer or in 'Files'.

External Images: Add a static image from an online external source .

Image Map: Add a static image with different clickable sections.

Image Slider: Create rotating slides using multiple images.

Image Icons: Add multiple images within one row.

Plain Text: Add text and use the editing tools to change the text appearance.

Text Link: Add hyperlinks to text and use the editing tools to change the text appearance.

Quick Table: Create a table with columns and rows.

Text Answer: Add a question that requires a short text answer.

Comment Box: Add a box where users can input a long text answer.

Single Answer: Add a question that requires users to select one answer from multiple options.

Multiple Answer: Add a question that requires users to select more than one answer from multiple options.

Rating: Select from a variety of symbols, as well as the number of symbols you'd like to display.

Submit Button: Add this button to allow user to submit a form or survey they have filled in.

Countdown Timer: Select a future date and time for the time to countdown and use the editing tools to change the timer appearance.

Number Animator: Choose a number for the animator to count up to, as well as the caption and number appearance.

Map: Type the address / area for the map to display.

YouTube: Add a YouTube video that plays in your template.

Vimeo: Add a Vimeo video that plays in your template.

DailyMotion: Add a DailyMotion video that plays in your template.

SoundCloud: Add SoundCloud audio that plays in your template.

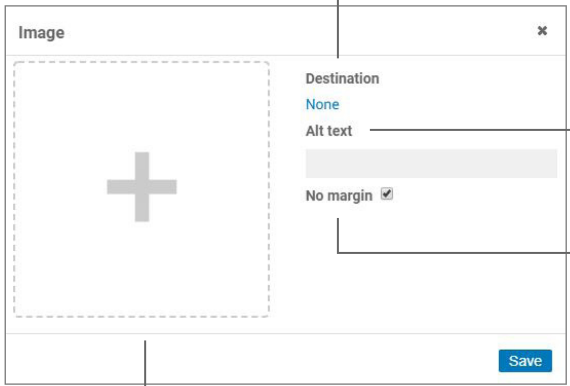
Barcode: Add a barcode to your template and choose your own code and symbology.

QR Code: Add a QR Code to your template and choose the code content.

Add content

Visuals

Visuals can be added from files stored on Mobiz or external sources. See page for linking an image to a destination.

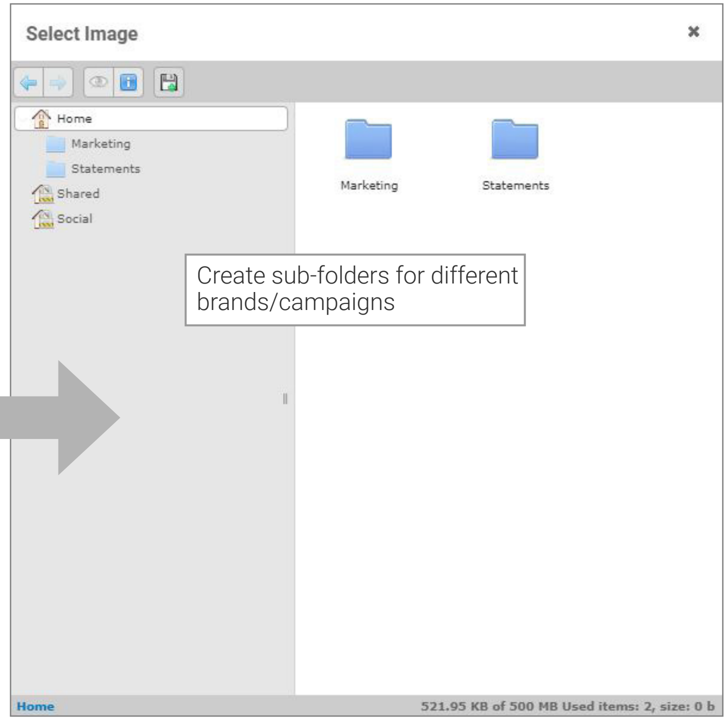


Select an action/location for the image to link to

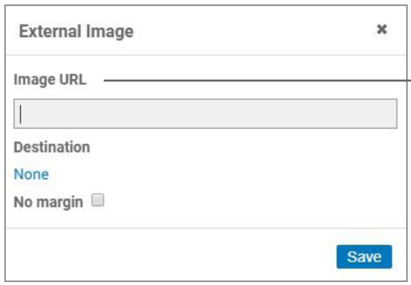
Select text that describes the image for users who can't see it

Choose whether to have the image fill the width of the screen or leave a gap

Choose image from file on your computer or files saved on Mobiz



Create sub-folders for different brands/campaigns



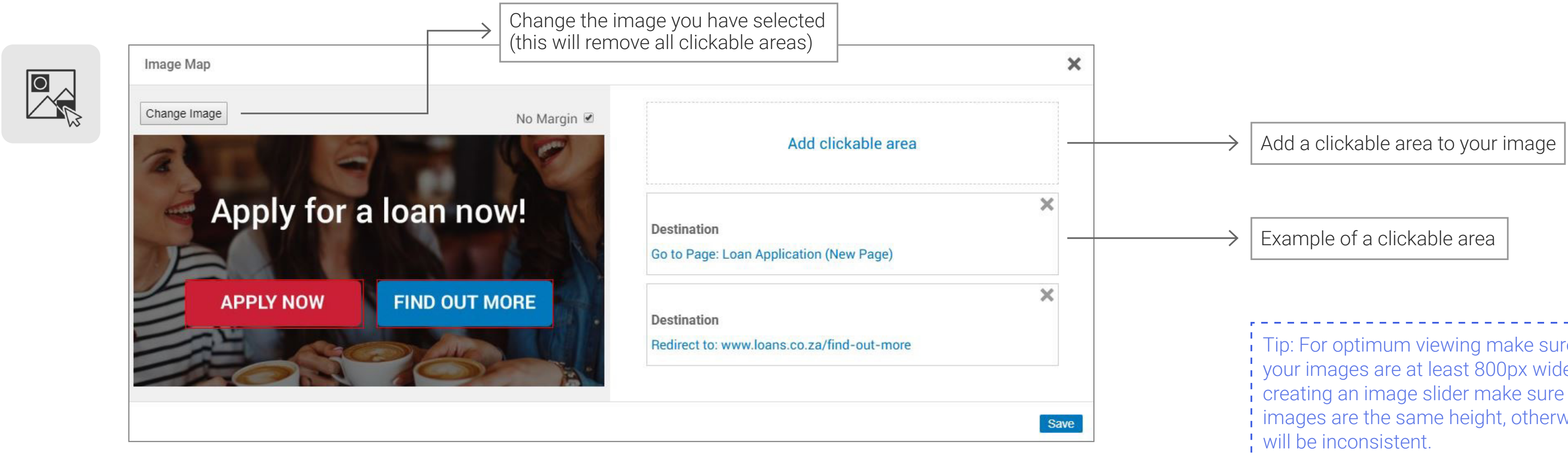
Select the URL location of the image

Tip: For optimum viewing make sure all your images are at least 800px wide.

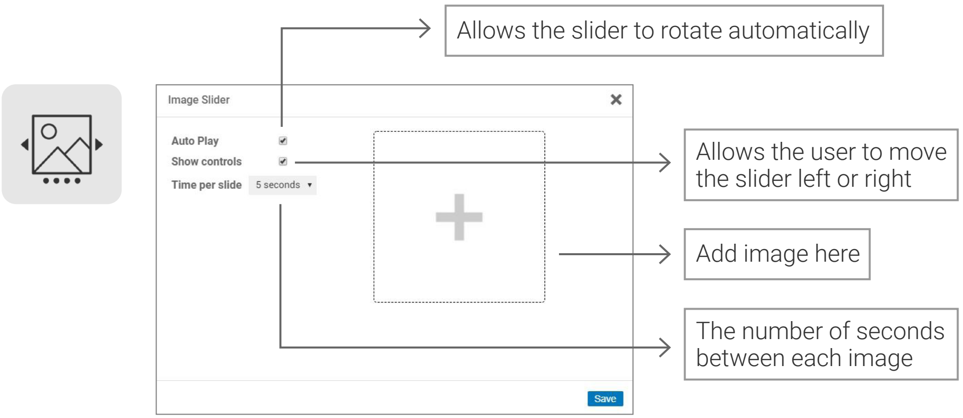
Add content

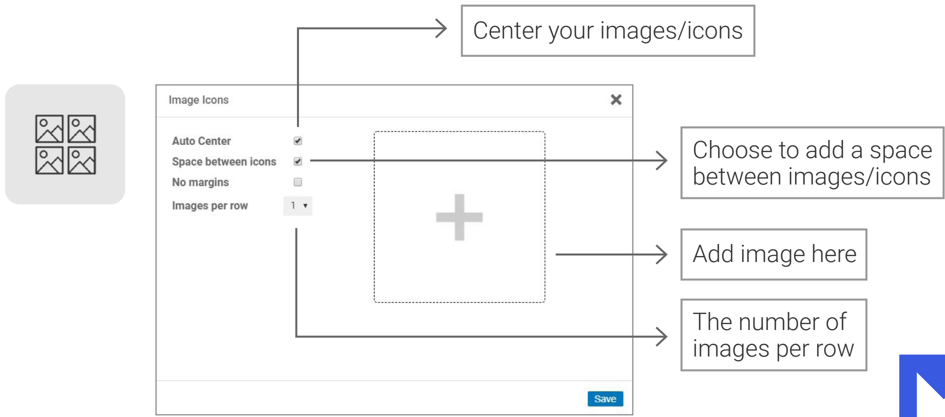
Visuals

Visuals can be added from files stored on Mobiz or external sources. See page for linking an image to a destination.



Tip: For optimum viewing make sure all your images are at least 800px wide. When creating an image slider make sure all your images are the same height, otherwise they will be inconsistent.

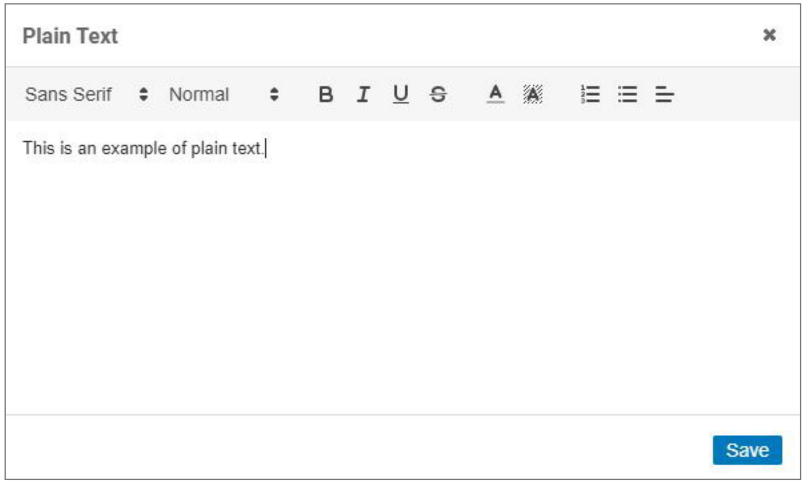


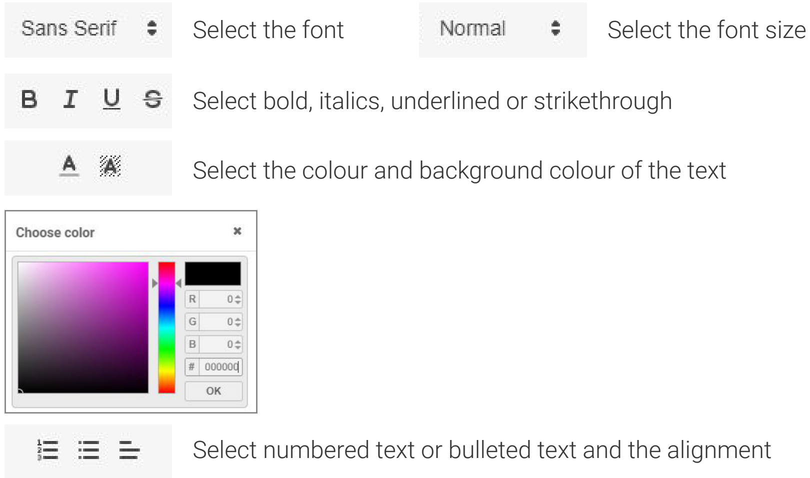


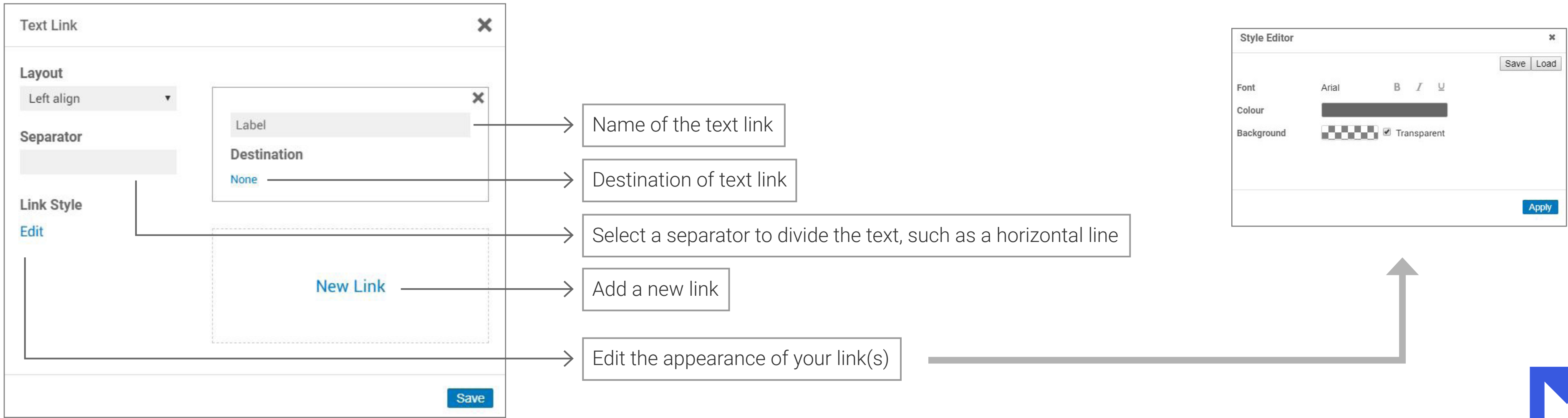
Add content

Texts

Add text to your template in the form of plain text, text links or a quick table.







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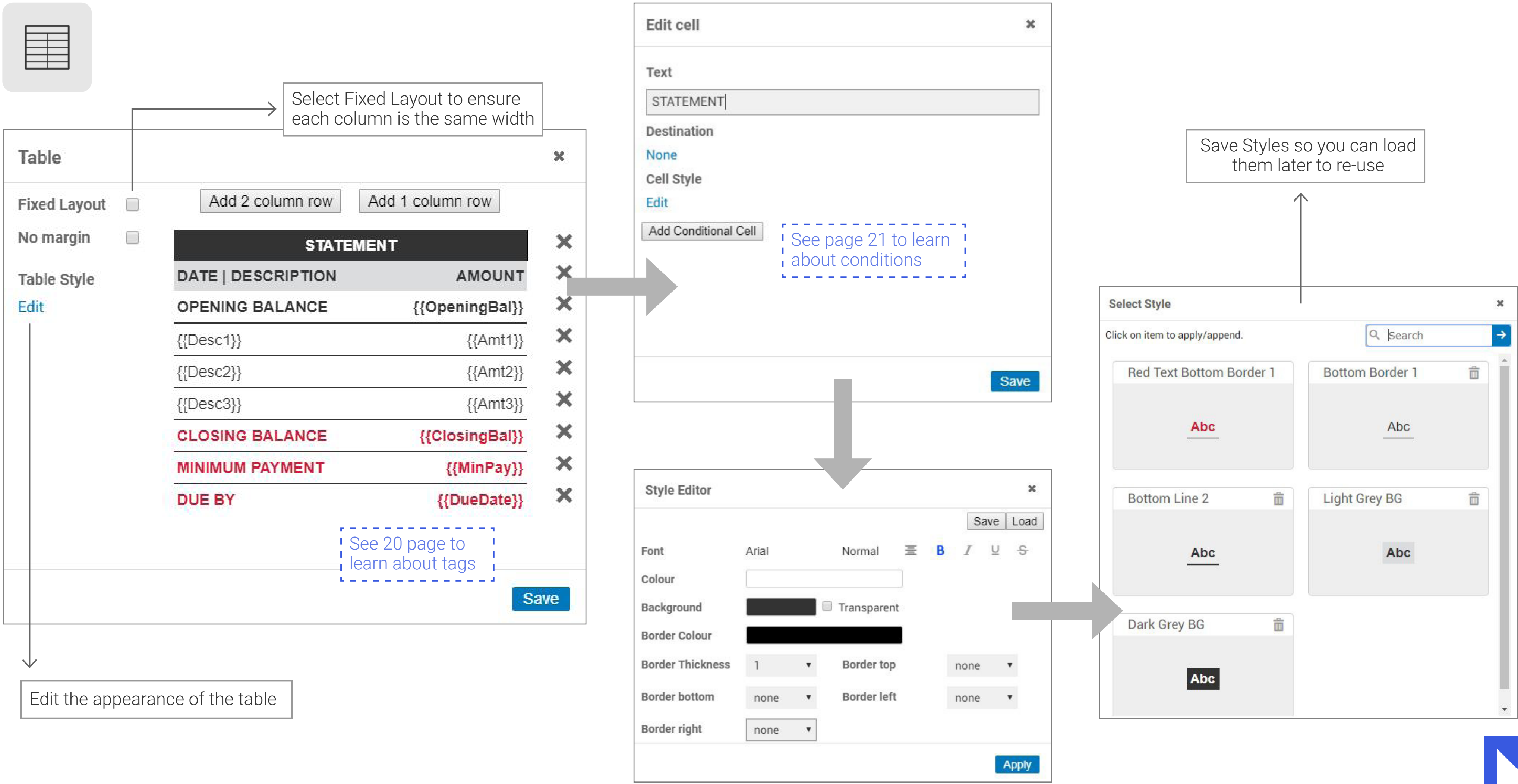
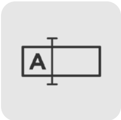
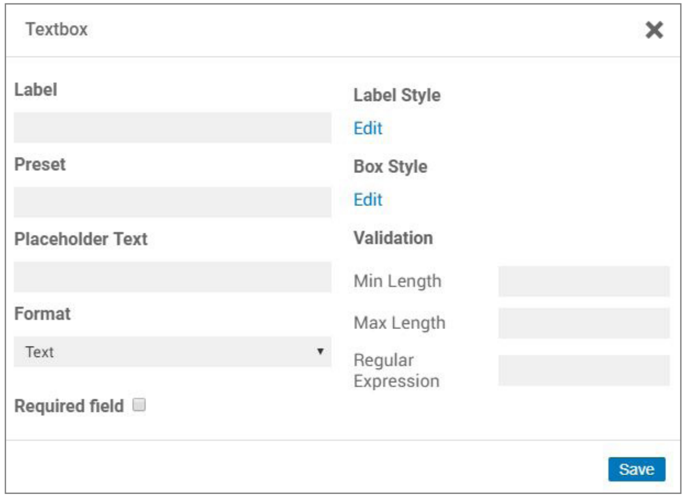


Add content

Questions

Create a form or survey by adding questions and a submit button in order to complete the form.





Label: Add your question here.

Preset: The standard text entry that will remain unless the user changes it.

Placeholder Text: Text that offers a hint about what the user needs to input and disappears once the user types their own answer.

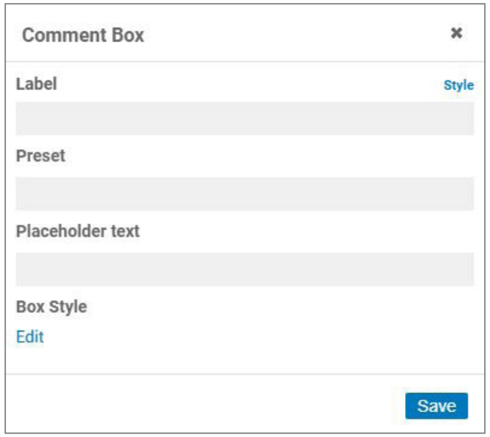
Format: Choose between Text, Numeric, Email, Phone Number and Date. This allows for the data entered to be validated and min/max values established.

Required field: Choose whether the user needs to provide an answer in this field in order to submit the form.

Label Style: Edit the appearance of the text question.

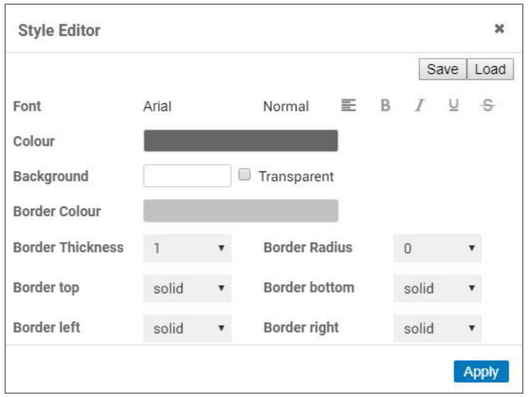
Box Style: Edit the appearance of the answer box.

Validation: Choose to have answer validated with min/max length, values or dates.



Edit the appearance of the label

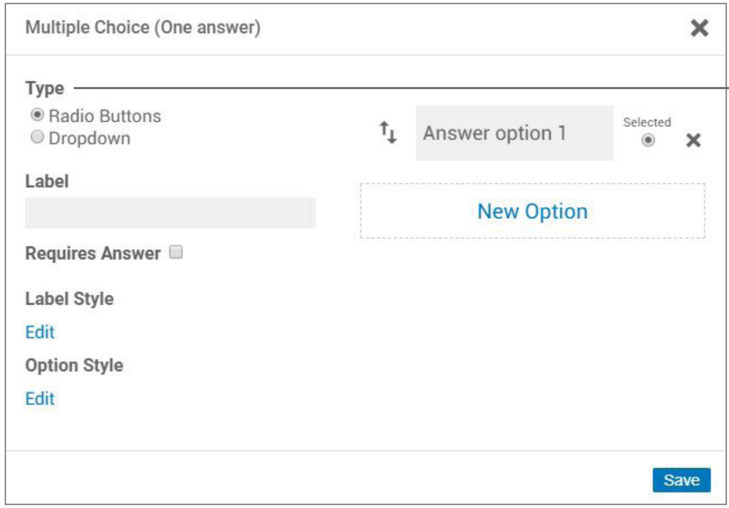
Edit the appearance of the label



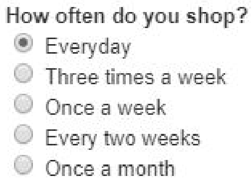
Add content

Questions

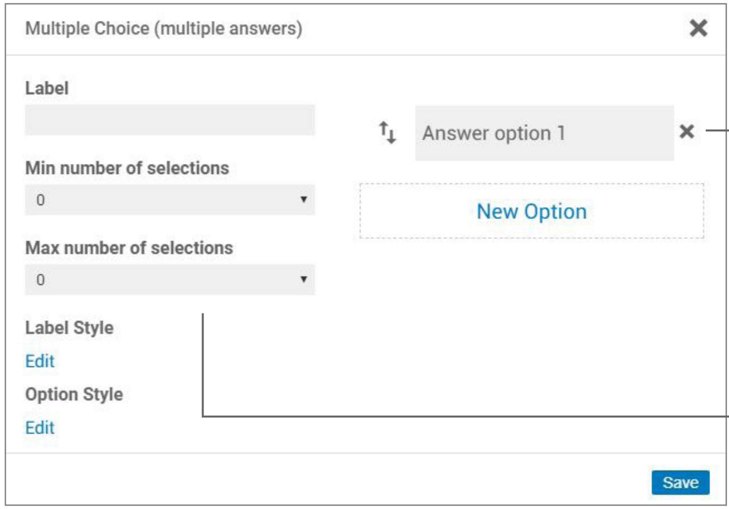
Create a form or survey by adding questions and a submit button in order to complete the form.



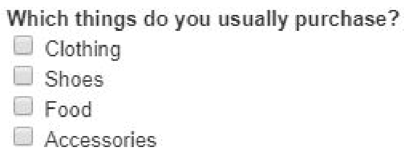
Radio Buttons



Dropdown



Example

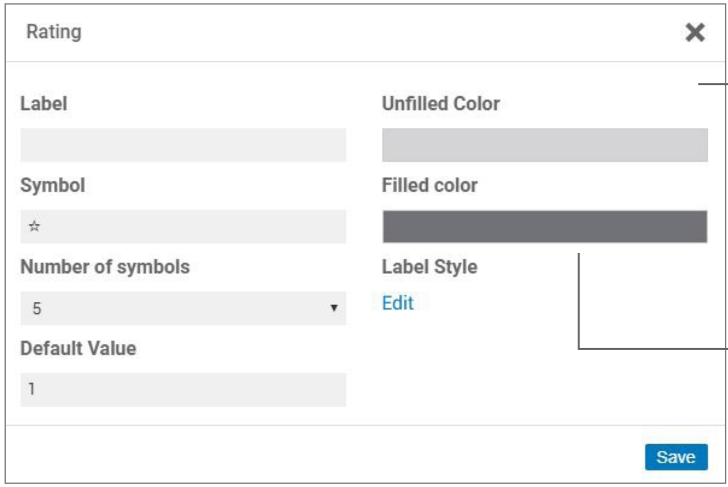


Select the minimum and maximum number of selections that a user can make

Add content

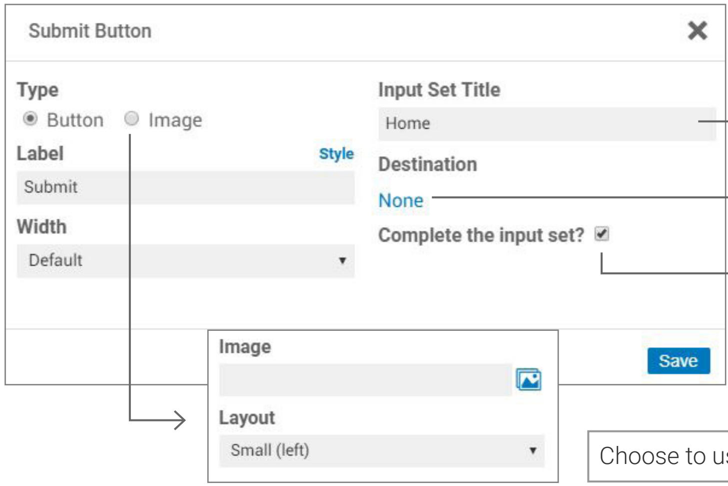
Questions

Create a form or survey by adding questions and a submit button in order to complete the form.



Example

Choose the symbol filled and unfilled colour



Select a name for your form or survey

Select where the user goes once they submit the form

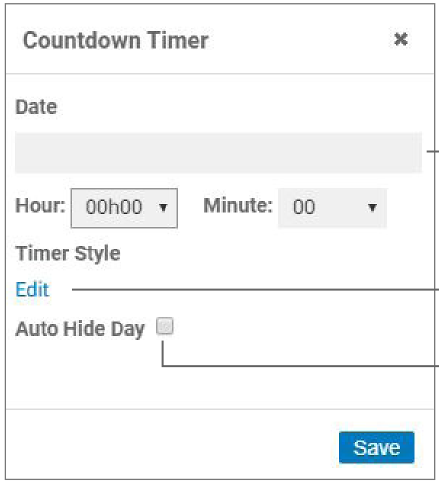
Choose whether the form input is complete or whether you would like users to continue answering questions on the next page

Choose to use a standard button or your own image

Add content

Widgets

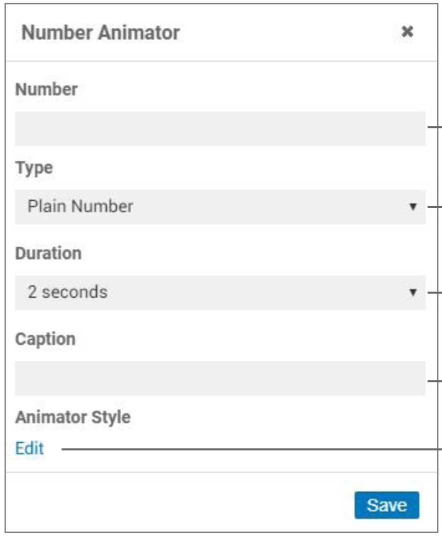
Add widgets to bring interest to your template.



Select the date and time you would like the timer to countdown to

Edit the appearance of the timer

Choose to hide the day if the timer is only counting down hours



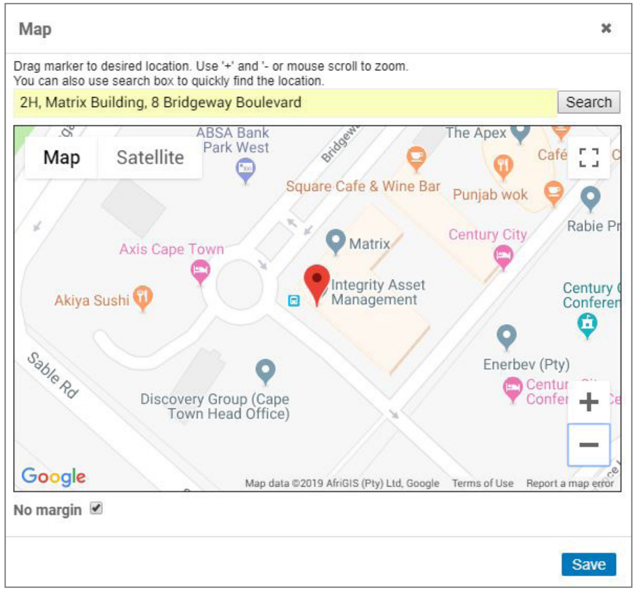
Type in the number you'd like to animate

Choose between a Plain Number, Decimal and Percentage

Choose how long the number animates for

Type in a caption for your number

Edit the appearance of the number

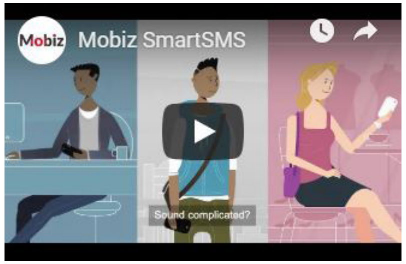


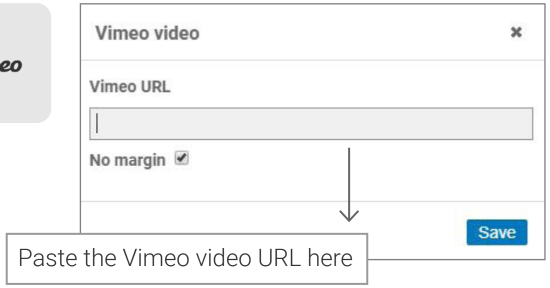
Type an address and click 'Search' to display location on the map. Use the plus and minus symbols to select the view you are happy with.

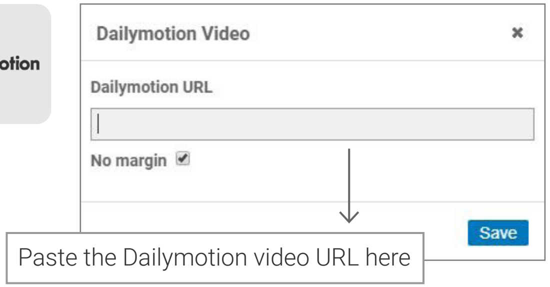
Add content

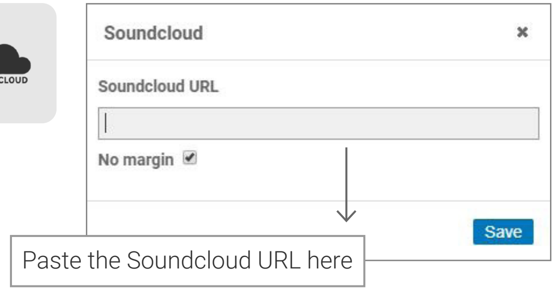
Embedded media

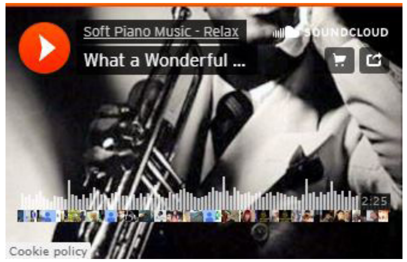
Add a video or sound file that plays in your template.







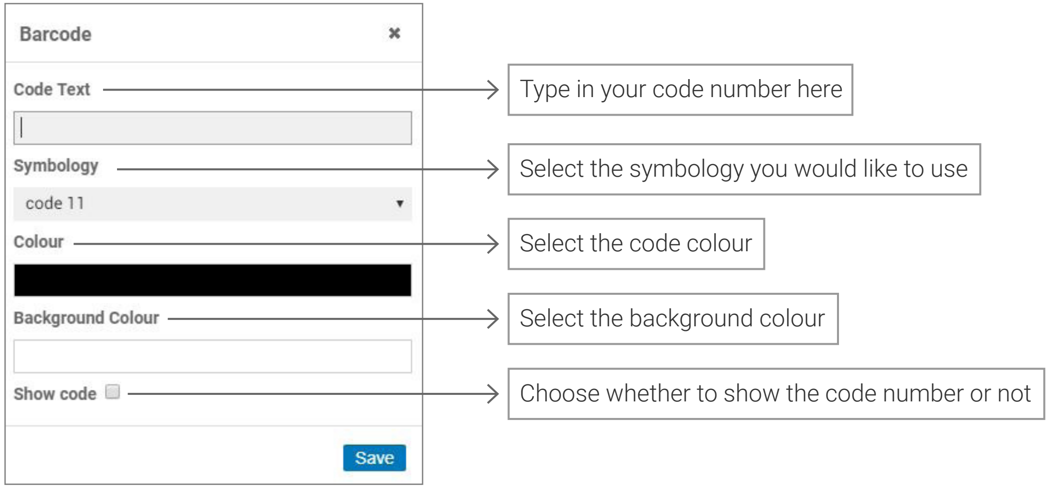


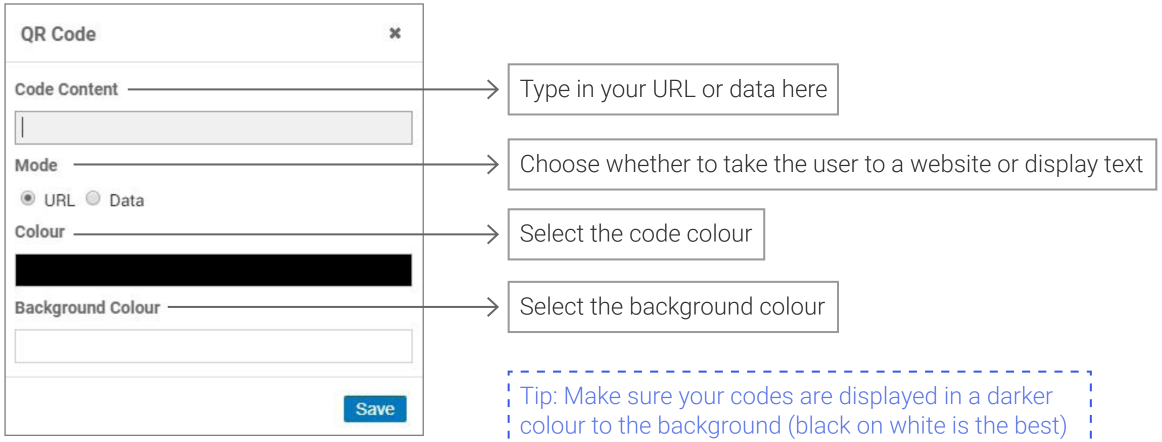


Add content

Codes

Add a video or sound file that plays in your template.





Tip: Make sure your codes are displayed in a darker colour to the background (black on white is the best) otherwise they will be difficult to scan.

Add content

Destinations

Control where the user is directed to when they tap on any of the content types that allow for a destination.

Call: Type in the number you would like users to call.

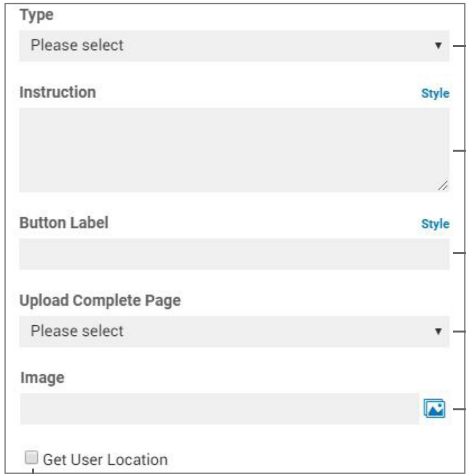
SMS: Type in the number you would like users to SMS.

WhatsApp: Type in the number you would like users to WhatsApp.

Email: Type in the email address you would like users to email.

Go to Page: Select an exisiting sub-page or create a new one that users will be taken to.

File Upload: Allows users to upload a file/image or take a picture with their camera.



Users can either upload a file/image or take a picture with their camera

Type the instructions that the user must follow, eg: Please upload your payslip, then click Submit

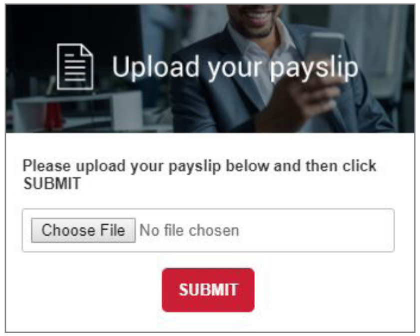
Type the button text, eg: Submit

Choose an existing sub-page or create a new one which will notify the user if their upload was successful

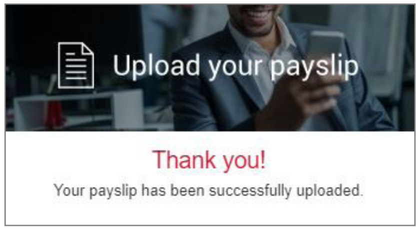
Select an image to display at the top of the page

Choose to get the user's location from the image

File Upload page example



File Upload complete page example



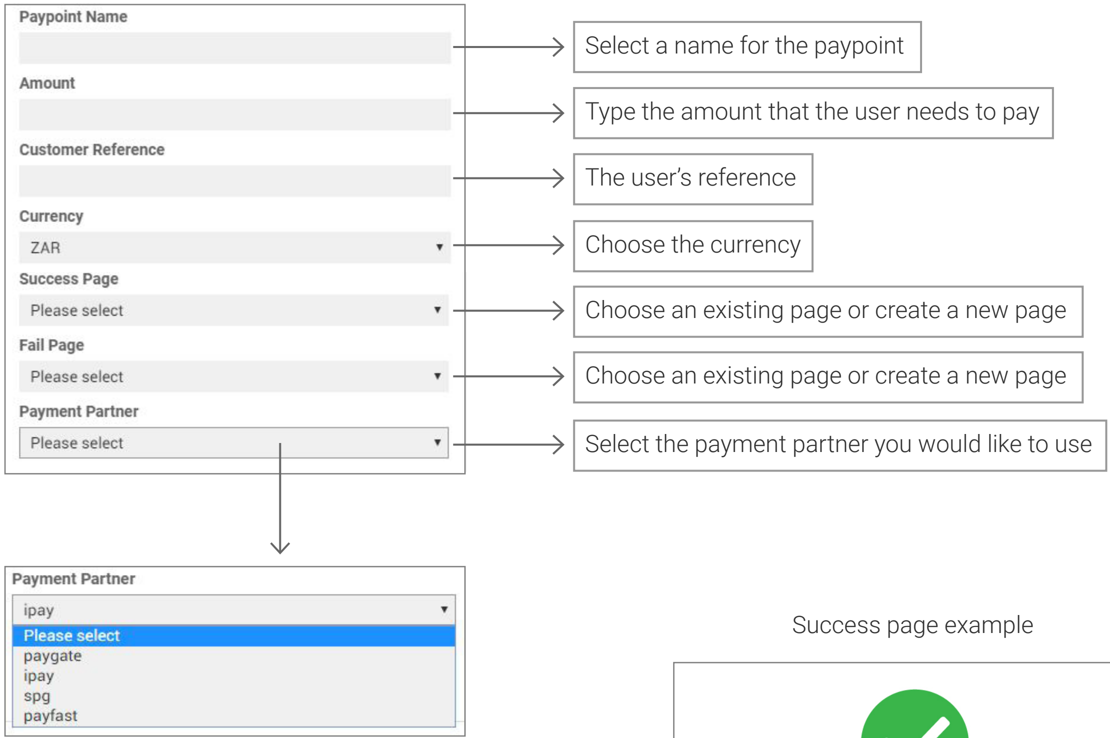
Note: You need to design your own success (File Upload complete) page.

Add content

Destinations

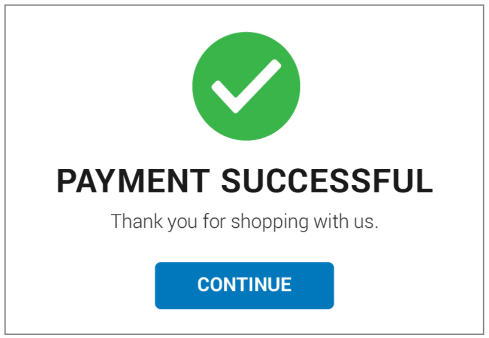
Control where the user is directed to when they tap on any of the content types that allow for a destination.

Payment: Allows users to make a payment via the chosen payment partner.

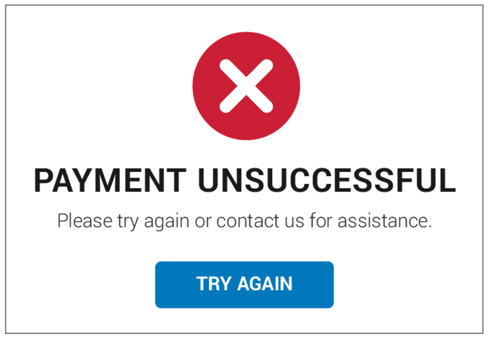


Tip: Use tags to allow for a different amount for each user. See page 20 to learn about tags.

Success page example



Fail page example



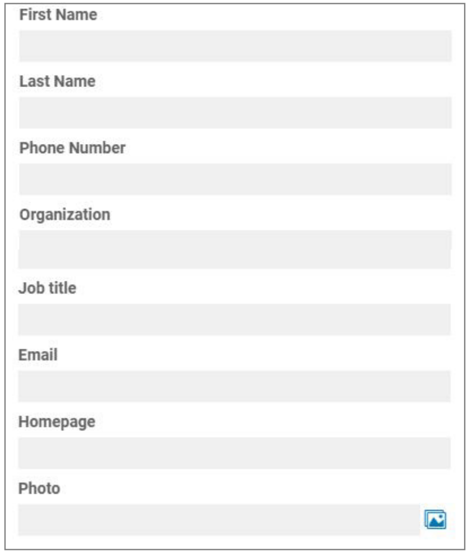
Note: You need to design your own Success and Fail pages.

Add content

Destinations

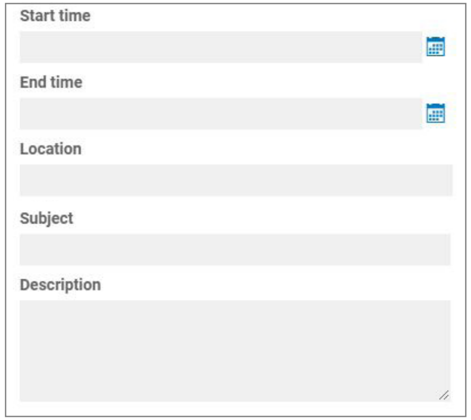
Control where the user is directed to when they tap on any of the content types that allow for a destination.

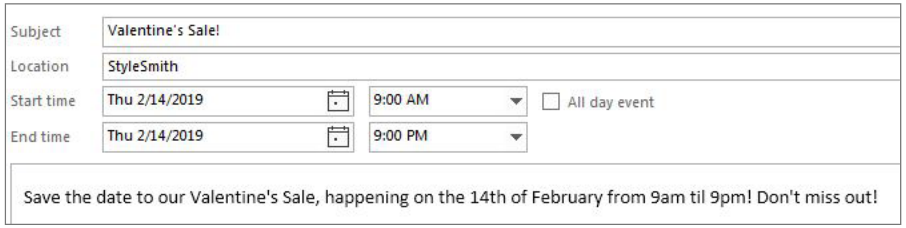
vCard: Allows users to download an electronic business card.



Example of vCard

Calendar: Create an event that users can save for future reference.





Example of calendar

Add content

Tags

Add tags to personalise the content in your template. The tags in your template need to be the same as the headings in your customer list, this is how the data is inputted into the template. Tags can be added by including double curly brackets on either side of the text, eg. {{Name}}. You also need to make sure that the tag uses the exact same text as featured in the customer list heading otherwise it won't show correctly.

Dear {{Title}} {{Name}} {{Surname}}, there is an amount of R {{MinPay}} due by {{DueDate}} on your StyleSmith account. View your statement below.

STATEMENT	
DATE | DESCRIPTION	AMOUNT
OPENING BALANCE	R {{OpeningBal}}
{{Desc1}}	R {{Amt1}}
{{Desc2}}	R {{Amt2}}
{{Desc3}}	R {{Amt3}}
CLOSING BALANCE	R {{ClosingBal}}
MINIMUM PAYMENT	R {{MinPay}}
DUE BY	{{DueDate}}

Tags from customer list

Dear Mr Vuyo Dhlamini, there is an amount of R 371.21 due by 05/06/2019 on your StyleSmith account. View your statement below.

STATEMENT	
DATE | DESCRIPTION	AMOUNT
OPENING BALANCE	R 4560.33
APR 12 | PURCHASE	R 800.00
APR 25 | PAYMENT - THANK YOU	R 500.00
MAY 11 | INTEREST	R 70.36
CLOSING BALANCE	R 4930.69
MINIMUM PAYMENT	R 371.21
DUE BY	05/06/2019

As seen by customer

Test your tags using the test data function

Test Data ×

Title →	Mr
Name →	Vuyo
Surname →	Dhlamini
MinPay →	371.21
DueDate →	05/06/2019
OpeningBal →	4560.33
Desc1 →	APR 12 | PURCHASE
Amt1 →	800.00

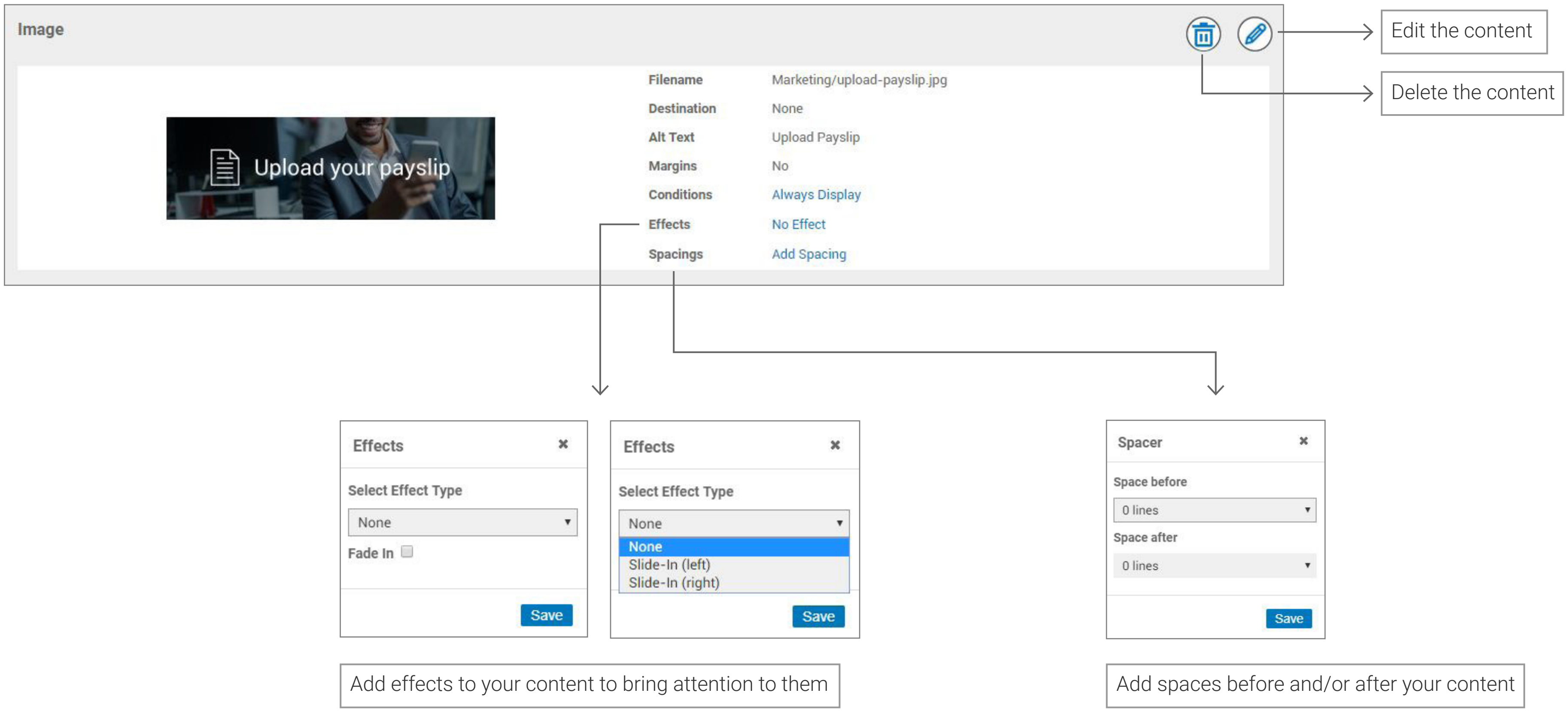
Save

See page 25 to find out more about customer lists

Functions	ID	Title	Name	Surname	Cellphone	Email	OpeningBal	Desc1	Amt1	Desc2	Amt2	Desc3	Amt3	ClosingBal	MinPay	DueDate
	1	Mr	Vuyo	Dhlamini	27825684899	vdhlamini@gmail.com	4560.33	APR 12 | PAYMENT	800.00	APR 25 | PAYMENT - THANK YOU	500.00	MAY 11 | INTEREST	70.36	4930.69	371.21	05/06/2019

Add content

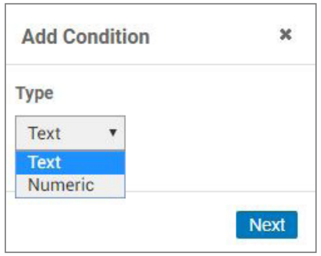
Effects and spacings



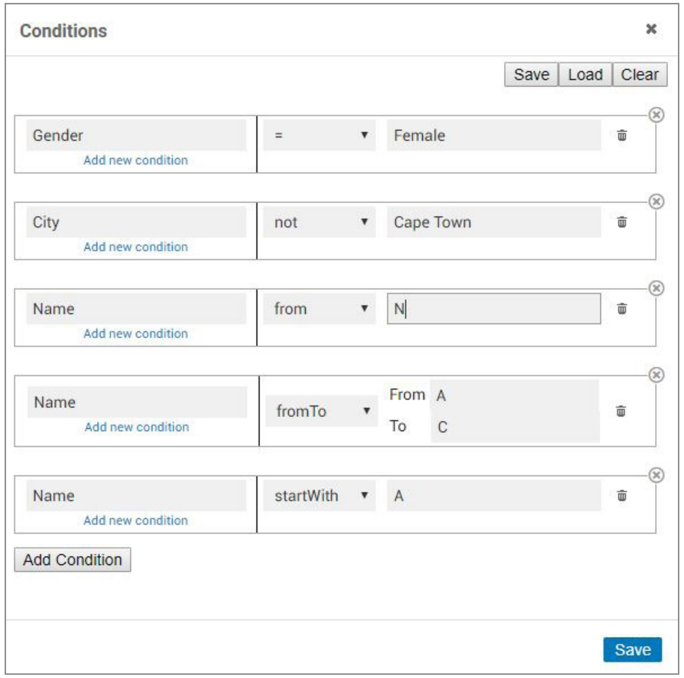
Add content

Conditions

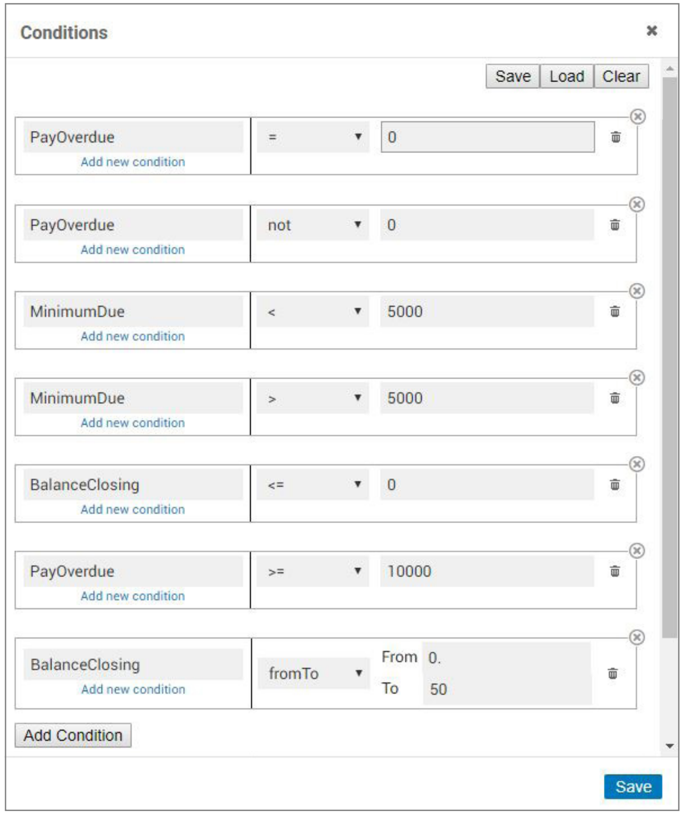
Conditions are used to control who sees specific content in the template. Conditions use tags, which come from the headings in your customer list. They can be added to all the different types of content.



Conditions can be text or numeric



Example of text conditions



Example of numeric conditions

Add content

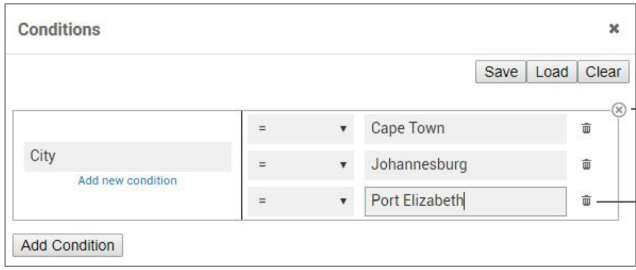
Conditions

Conditions are used to control who sees specific content in the template. Conditions use tags, which come from the headings in your customer list. They can be added to all the different types of content.

If you want to target multiple results for the same condition, select the blue 'Add new condition' instead of the 'Add Condition' button, otherwise you will only be targeting users who match all the conditions.

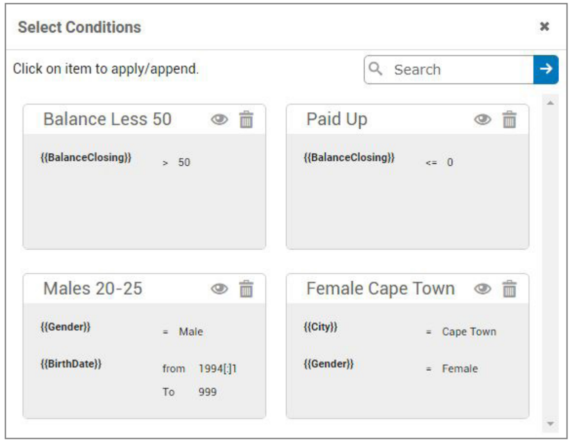
This will target users from Cape Town, Johannesburg OR Port Elizabeth

This will target users from Cape Town, Johannesburg AND Port Elizabeth

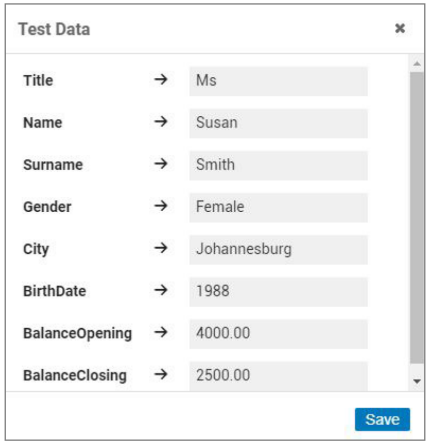


Delete the entire condition

Delete the single condition match



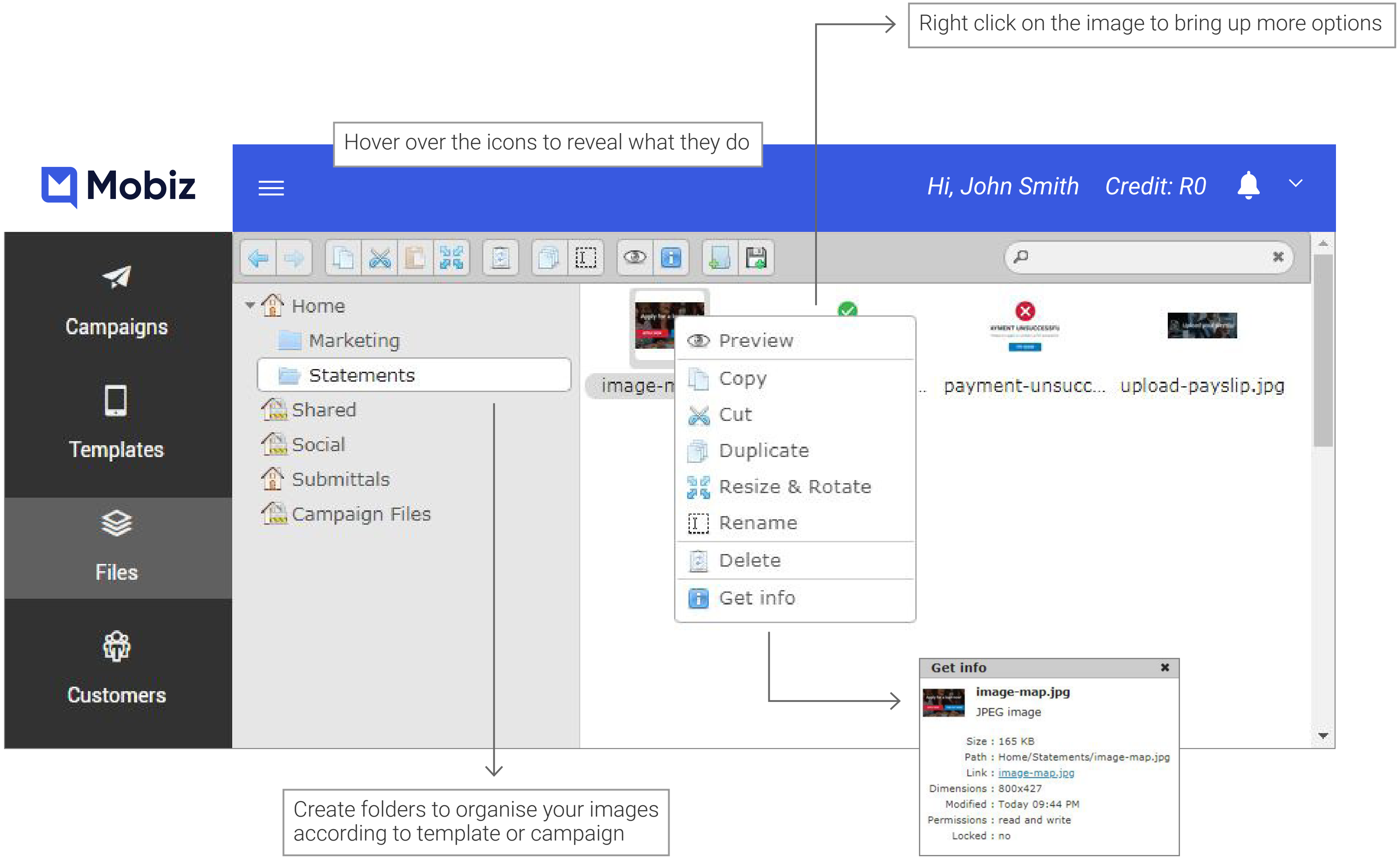
Save your conditions so you can load them later for re-use



Test your conditions using the test data function

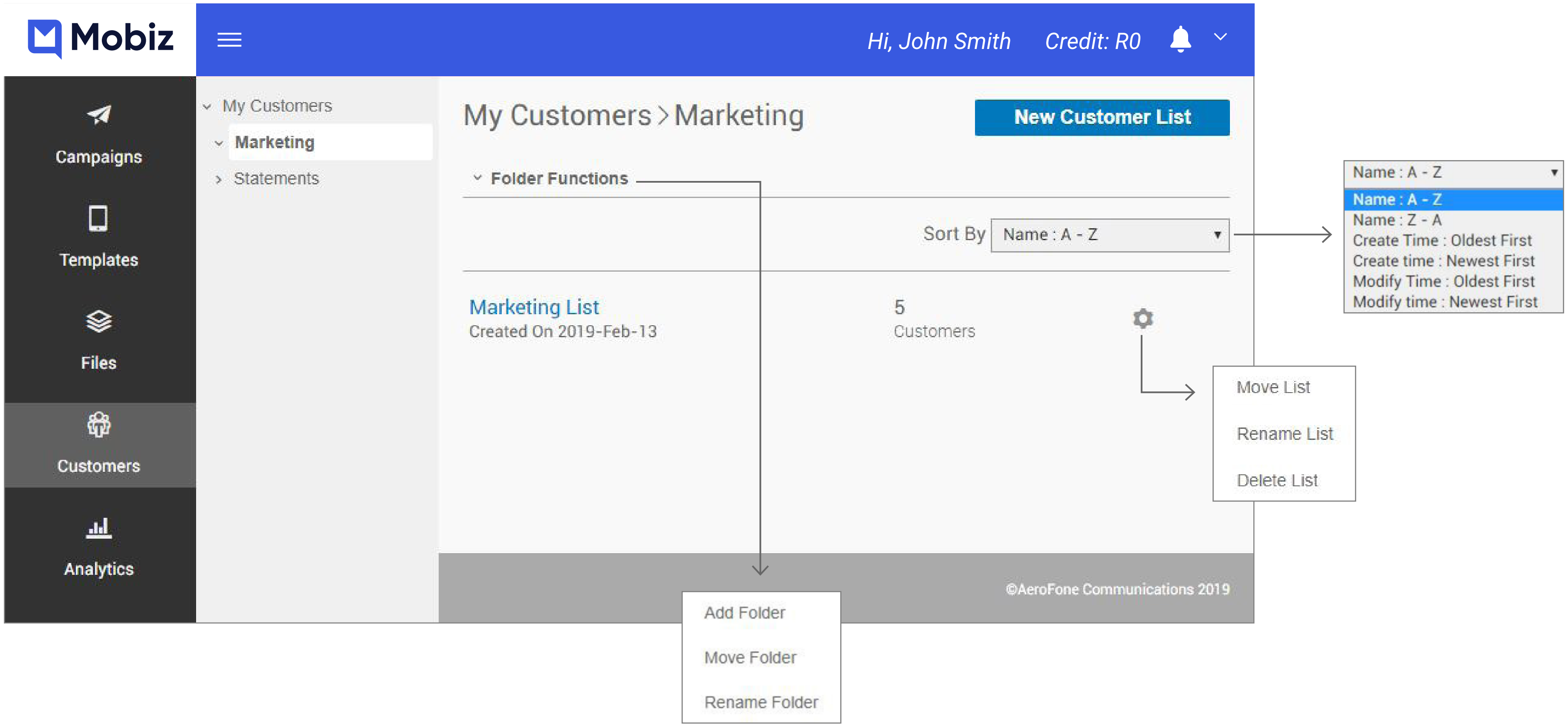
Files interface

Use the files interface to upload images to use in templates, edit them and sort them into folders.



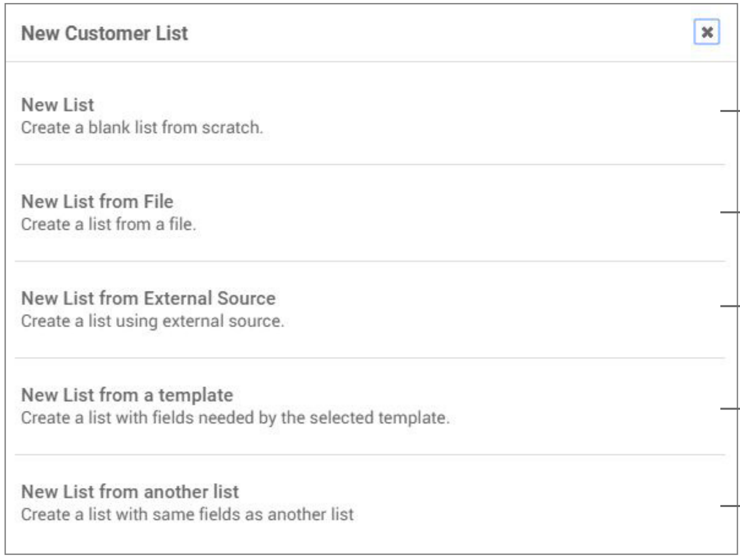
Interface

Use the Customers interface to create new customer lists and manage current ones.



New customer list

There are various different ways to create and import new customer lists.



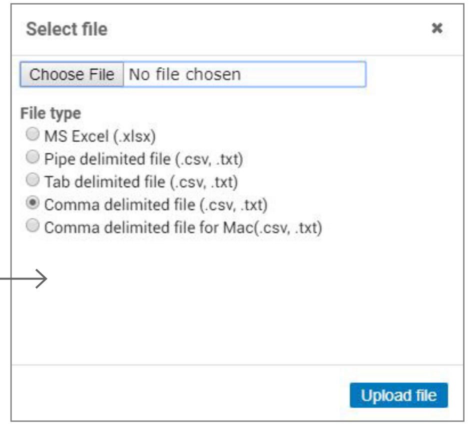
Create a new list only if you have no existing data

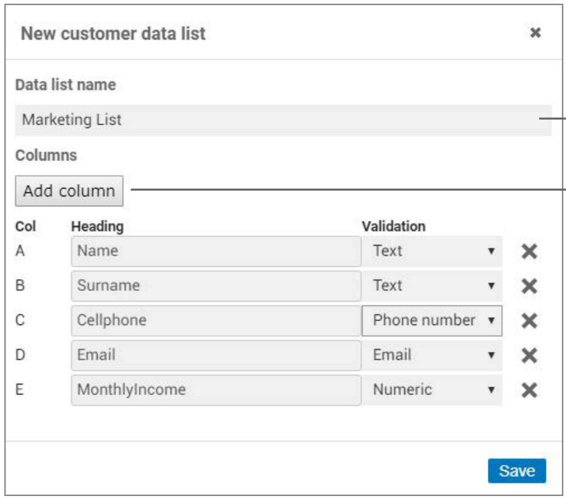
Most commonly used option. Import and choose a list from a file located on your computer saved in any of the formats displayed

Create a new list from a file uploaded on the cloud

Create a new list with fields required by a selected template

Create a new list using fields from an existing list





Give your list a name

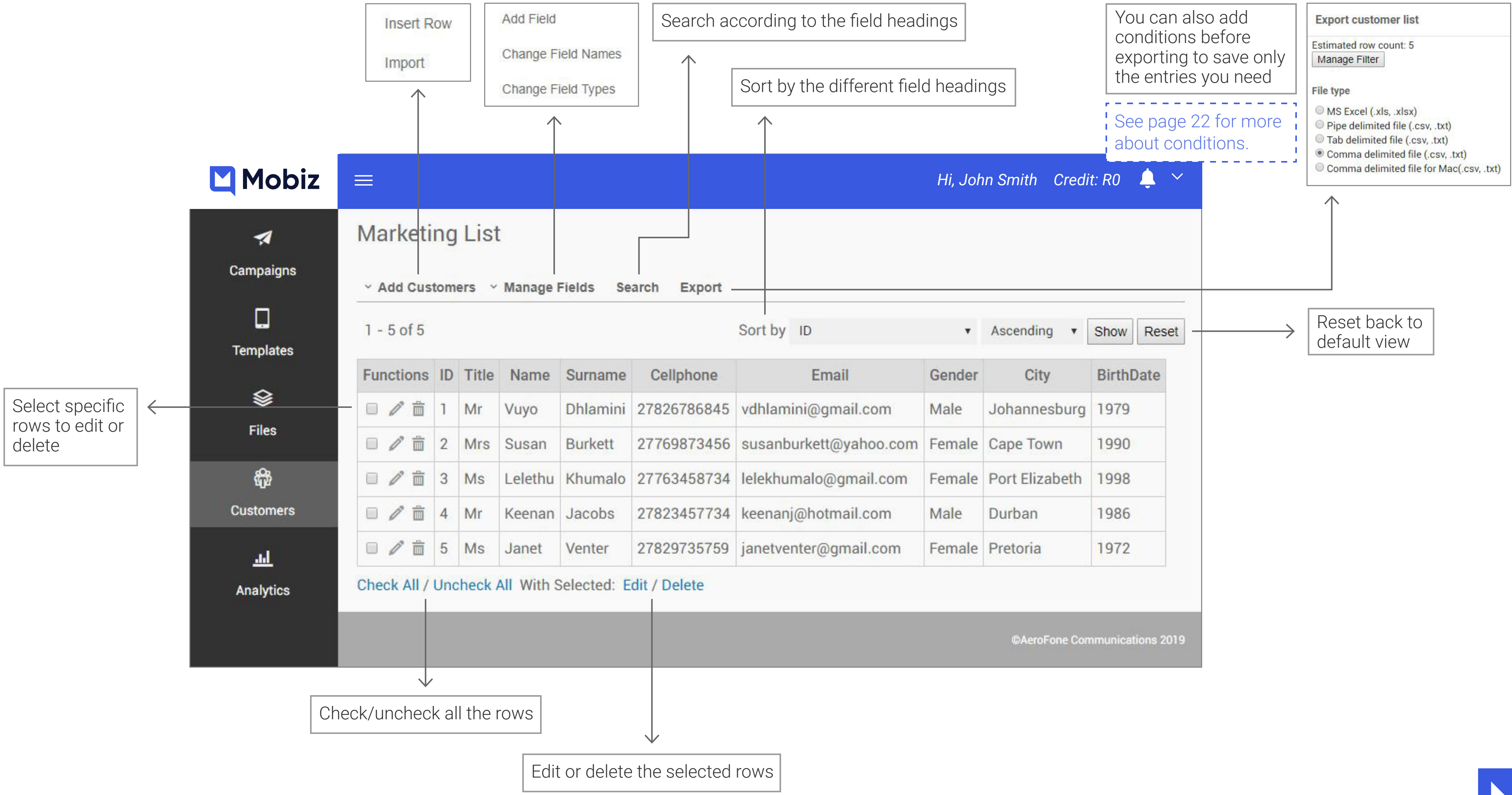
Add columns to your list

Select the correct validation for each heading according to the data you will be inputting

Note: You need to include a cellphone number field otherwise you will not be able to send your campaign.

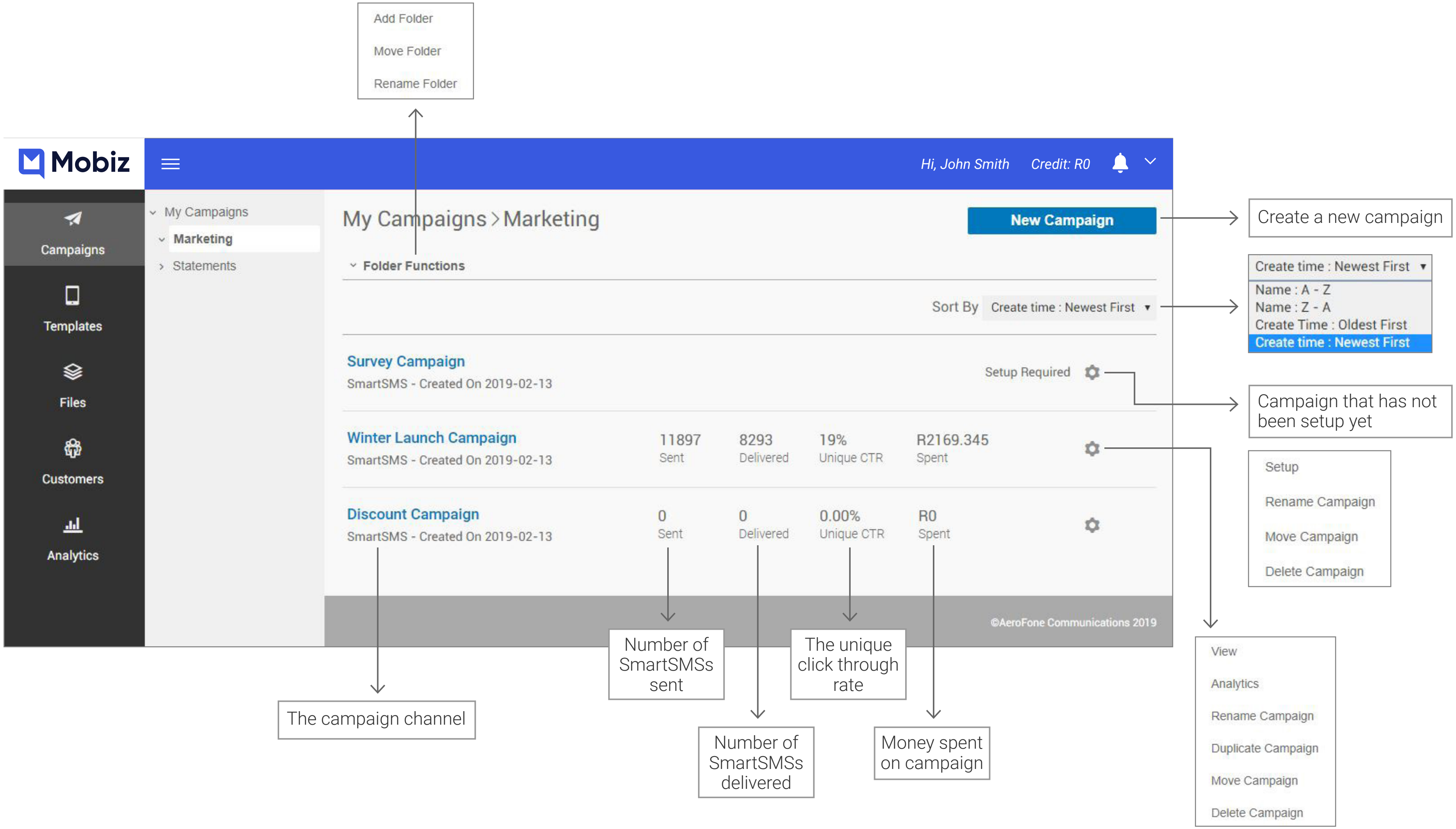
Customer list dashboard

Get to know the customer list interface and how to add and edit customers.



Interface

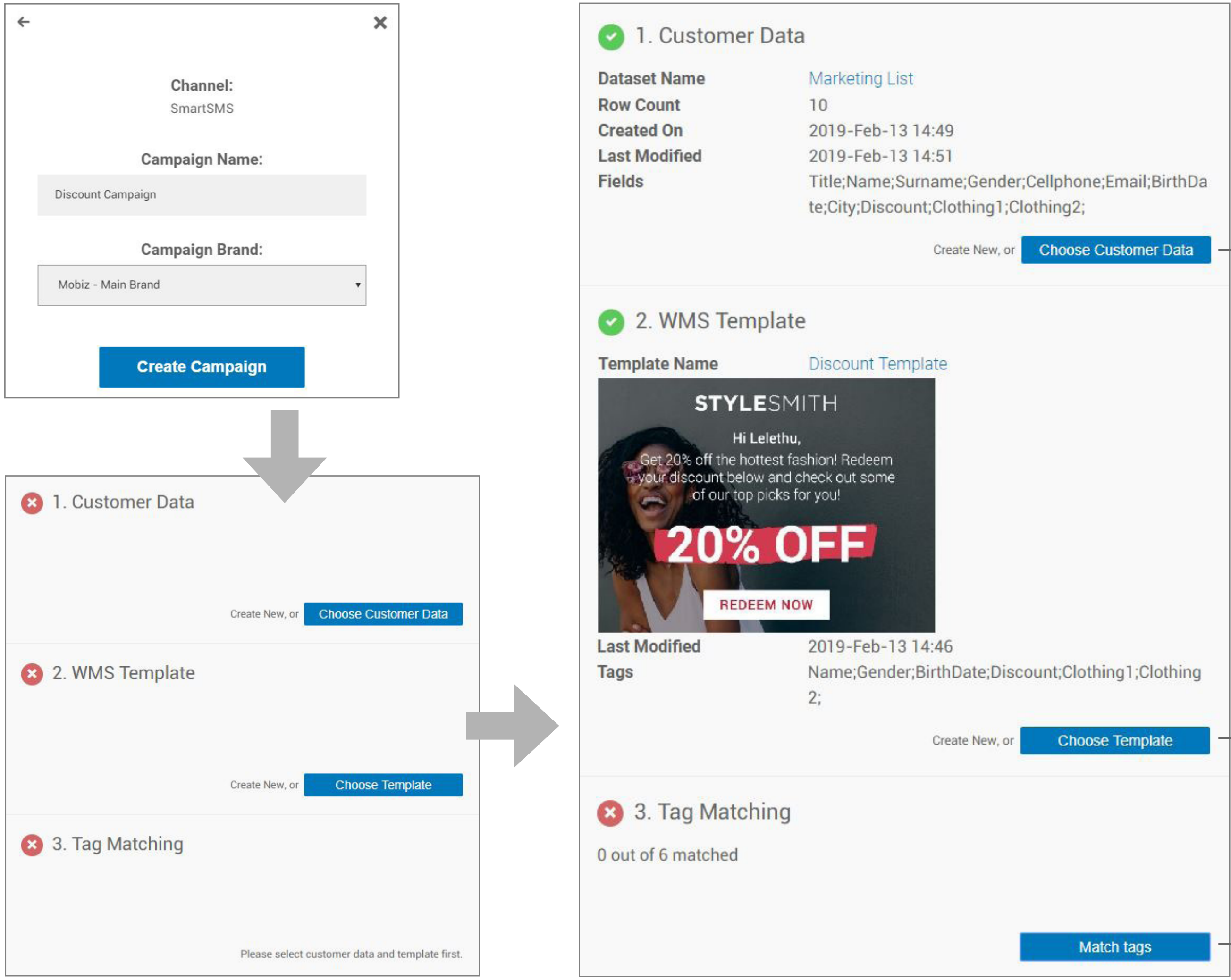
Get to know the campaigns interface and how to setup a campaign.



Create a new campaign

SmartSMS

Create an SMS with a web-enabled link that takes users to a personalised landing page.



Create a new customer list or use one you have already created

Note: If you choose to create a new customer list or template you still need to add customers and design your template.

Create a new template or use one you have already created

Match the tags to ensure they are the same on the template and customer list

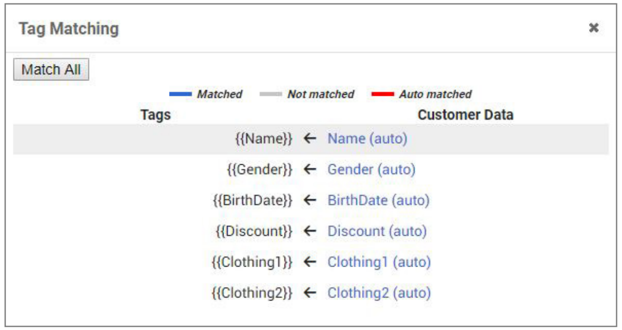
Create a new campaign

SmartSMS

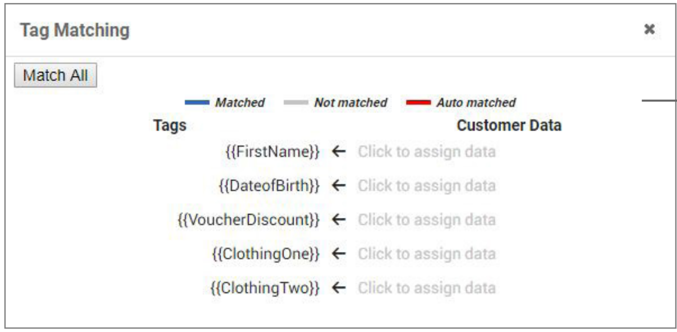
Create an SMS with a web-enabled link that takes users to a personalised landing page.

Matching Tags

Before you can complete the setup for your campaign, Mobiz needs to ensure that the tags in your template match the field headings in your customer list. If your tags and field headings have the exact same text, then Mobiz can easily auto match them, however sometimes you may have used a different word and Mobiz is unable to match them. In this case you will need to manually match them to ensure that they are the same.

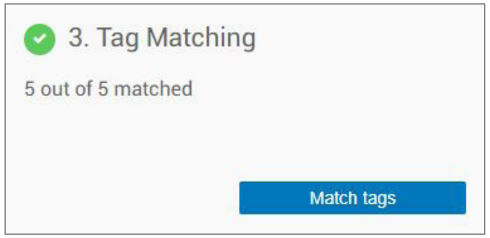


An example of tags that have been auto matched by Mobiz



An example of unmatched tags

Select 'Match All' to match all the tags at once, or 'Click to assign data' to match each tag individually



Once all your tags are matched you can complete the setup of your campaign

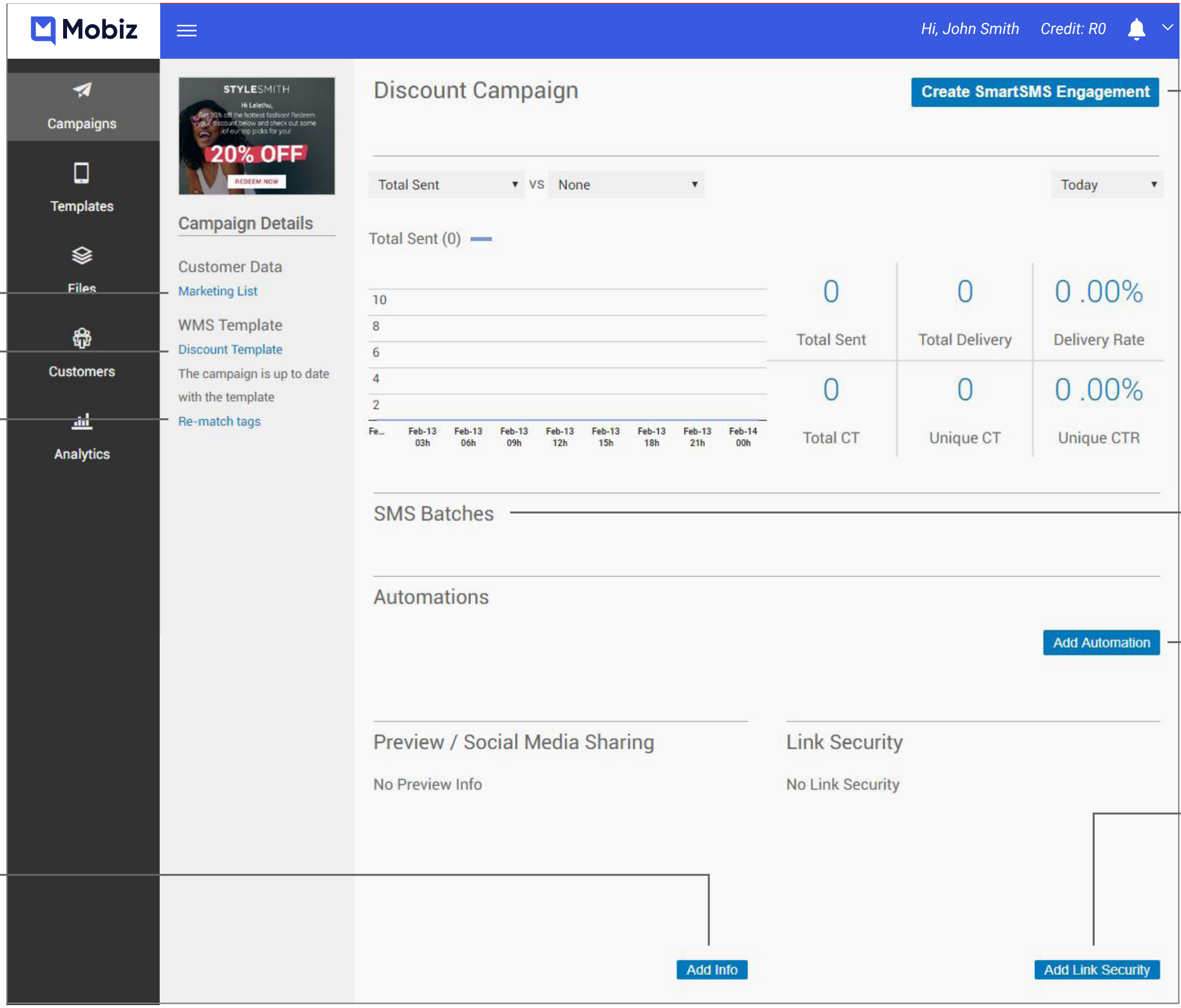
Match the tag by choosing the corresponding field name, in this case {{FirstName}} can be matched to {{Name}}

If you have a tag that cannot be matched to any of the field names, you will need to go back to your template and remove the tag or create that field name in your customer list

SmartSMS

Campaign Interface

Get to know the campaign interface.



Send a test campaign or send campaign to customers

Analytics overview

This is where it will show the SMSs you have sent

Add automations here

See page 33 to find out more about automations

Add link security

See page 34 to find out more about link security

Customer list

Template

Every time you edit the template you need to re-match the tags to ensure the campaign being sent is the latest version

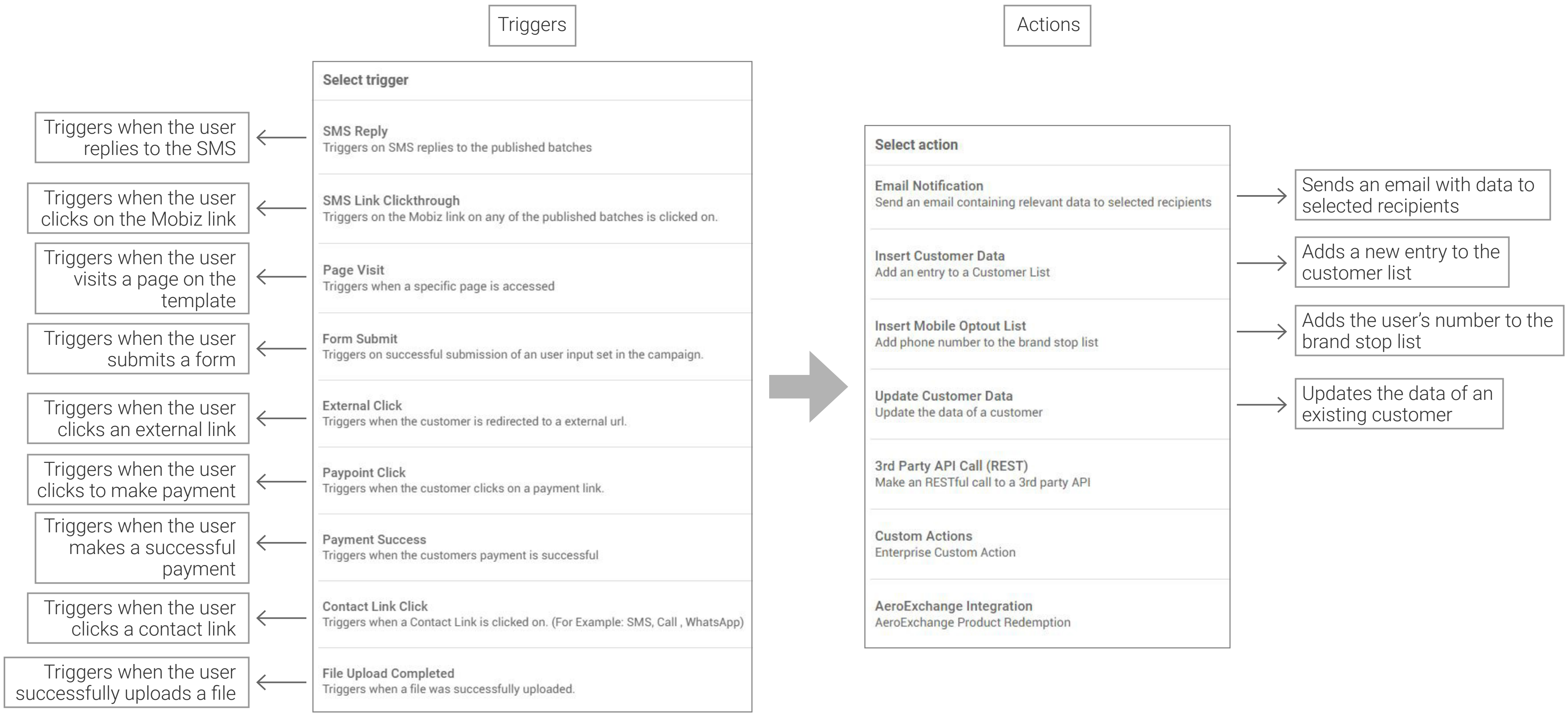
Add a social media preview or video

See page 34 to find out more about social media previews

SmartSMS

Automations

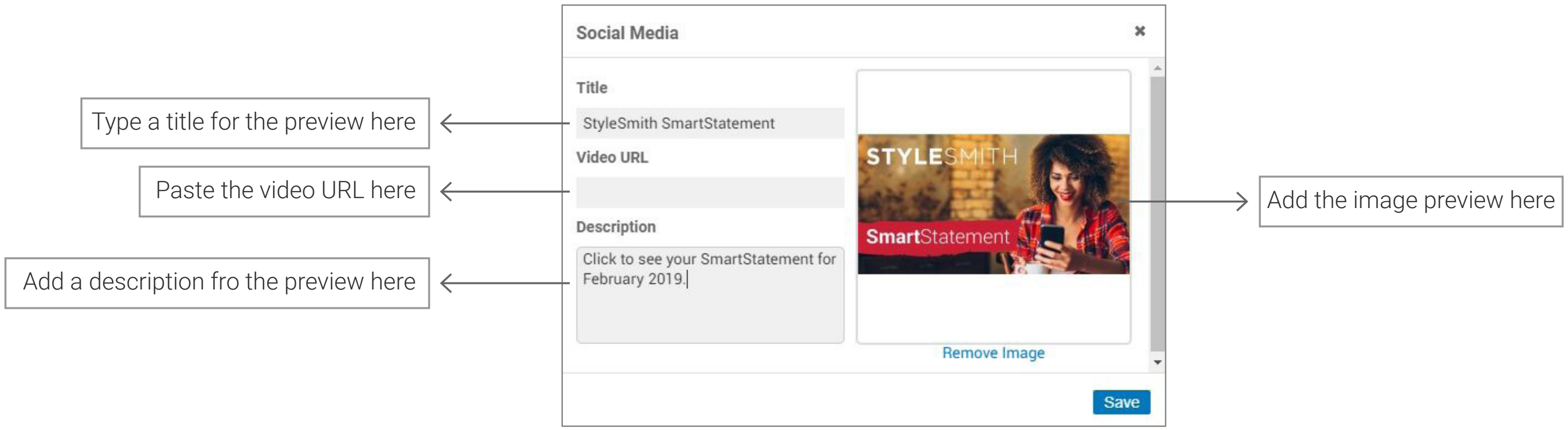
Automations are triggers that happen when the user interacts with the SMS or template.

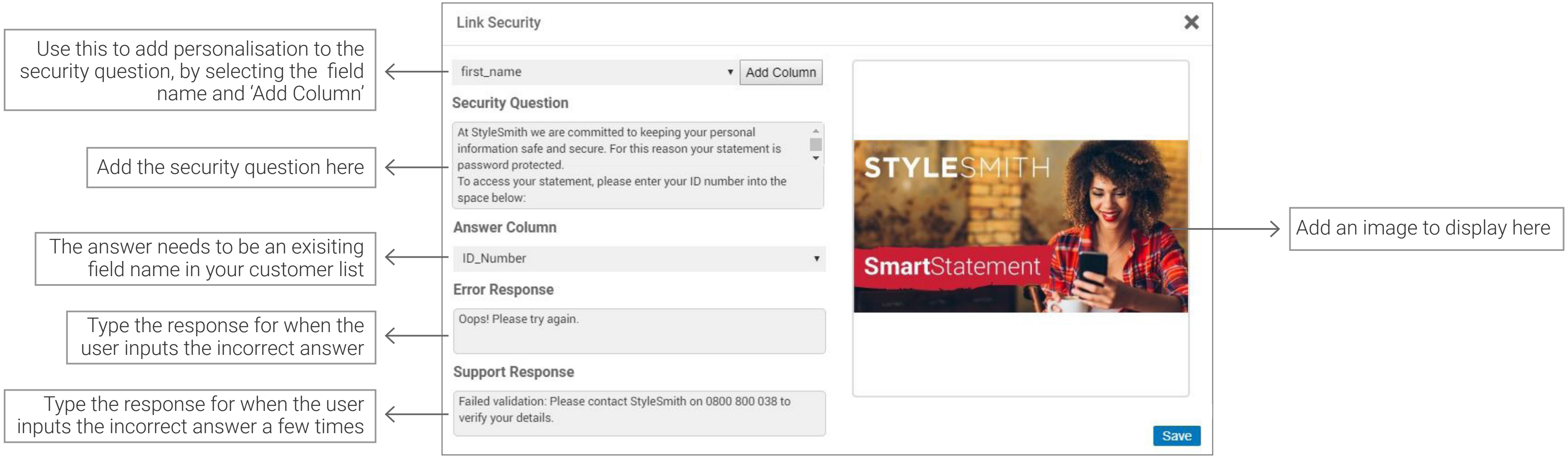


SmartSMS

Preview and link security

Add a preview that displays underneath the SMS text on some phones or when users share the campaign to others. Link security offers peace of mind to the user when sending statements by asking for a specific password before users can access the template.

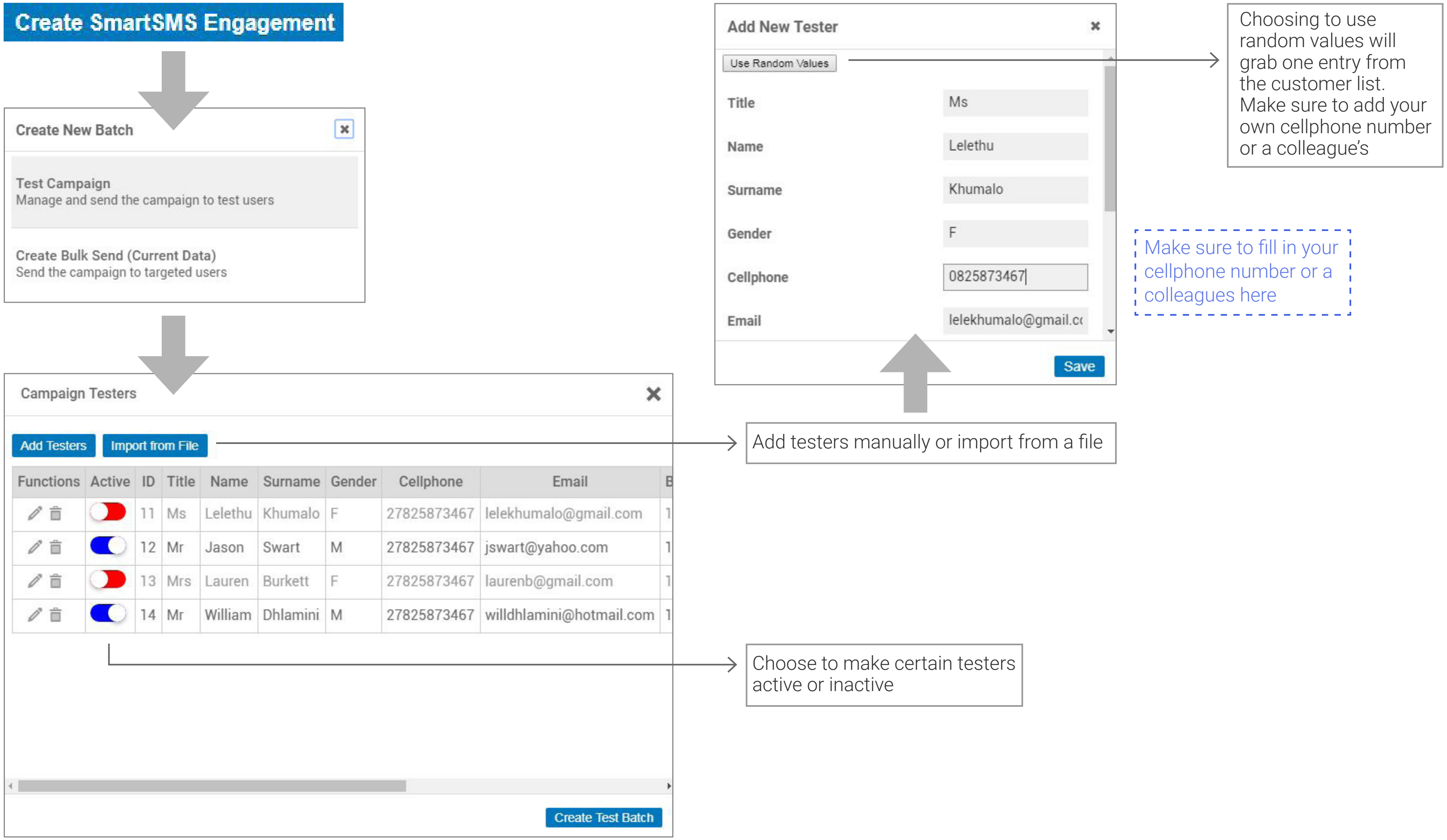




SmartSMS

Campaign testing

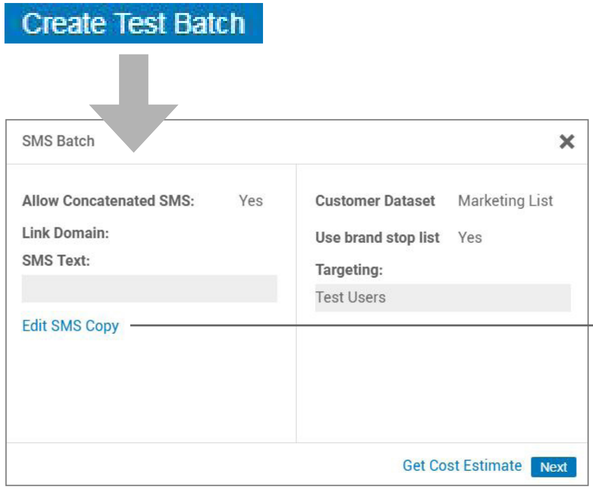
Before you send your campaign, test it first to ensure that everything is working correctly.



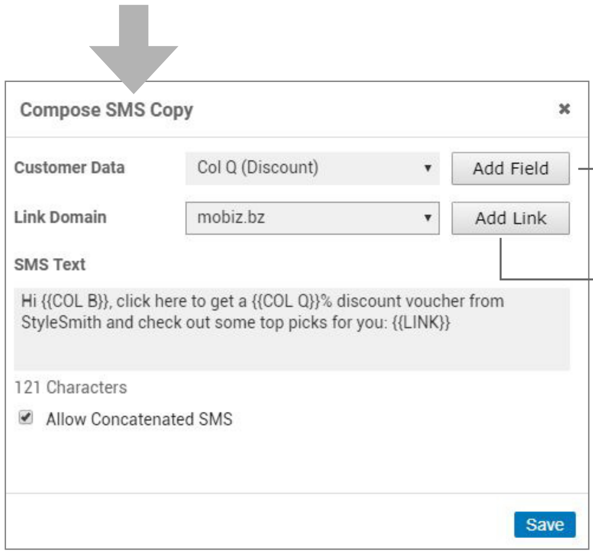
SmartSMS

Campaign testing

Before you send your campaign, test it first to ensure that everything is working correctly.



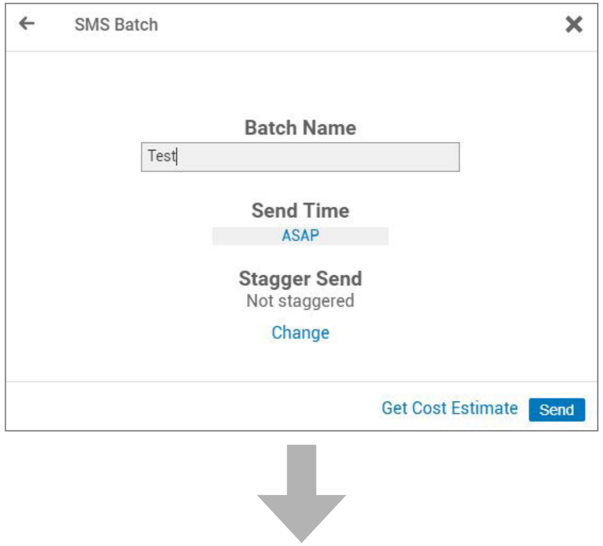
Click here to edit the SMS copy for your test

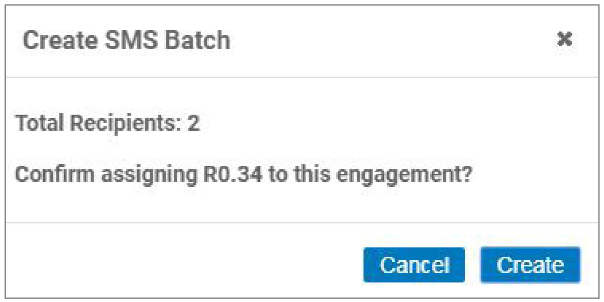


Add personalisation to your SMS text by selecting the field heading and 'Add Field'

Choose your preferred link domain and select 'Add Link' to add in the Mobiz link

Do not manually type in the field headings you want to use, such as {{Name}}, you need to use the 'Add Field' function.

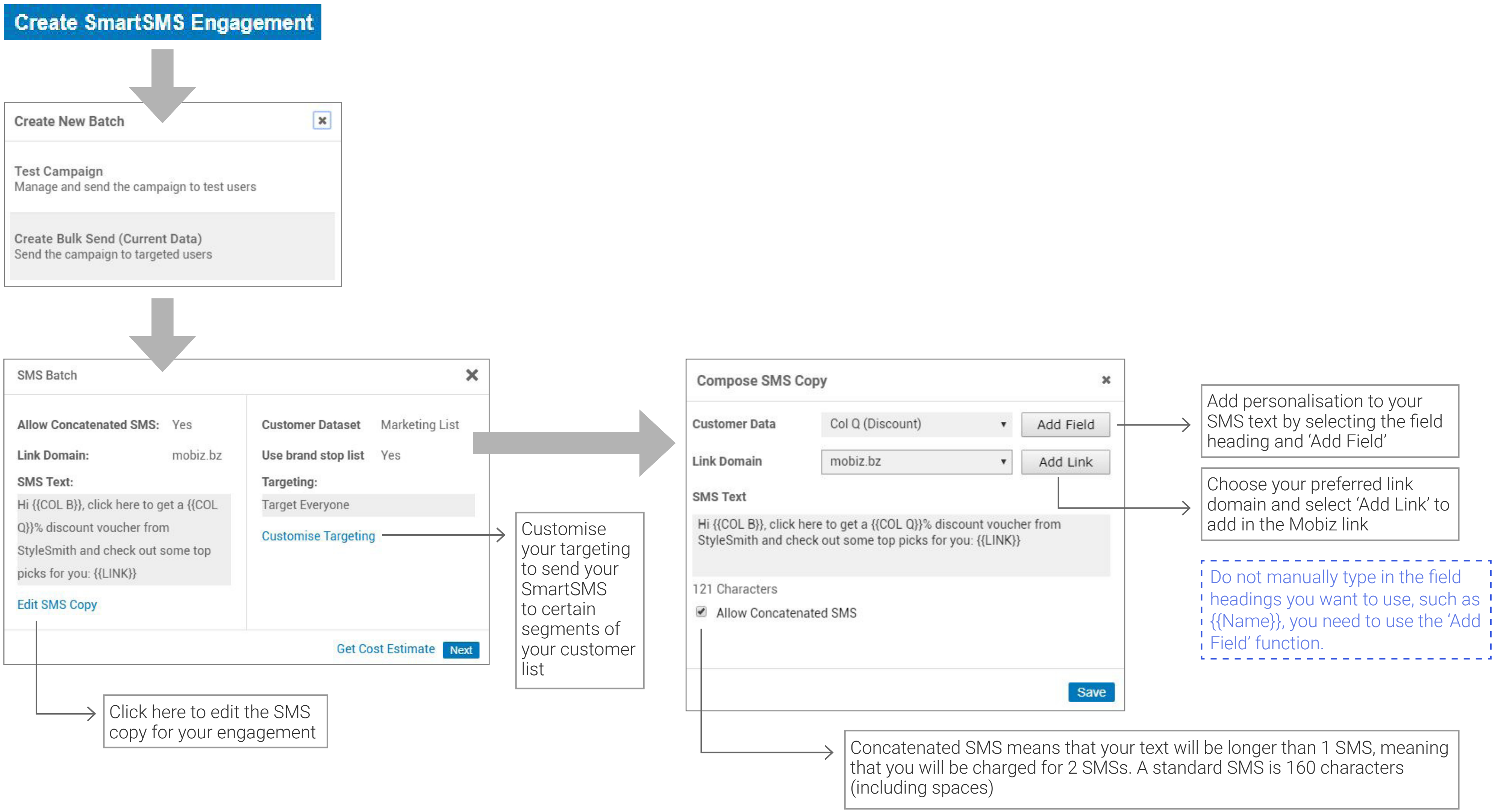




SmartSMS

Sending engagements

Engagements are when you send your SmartSMS to your customers.



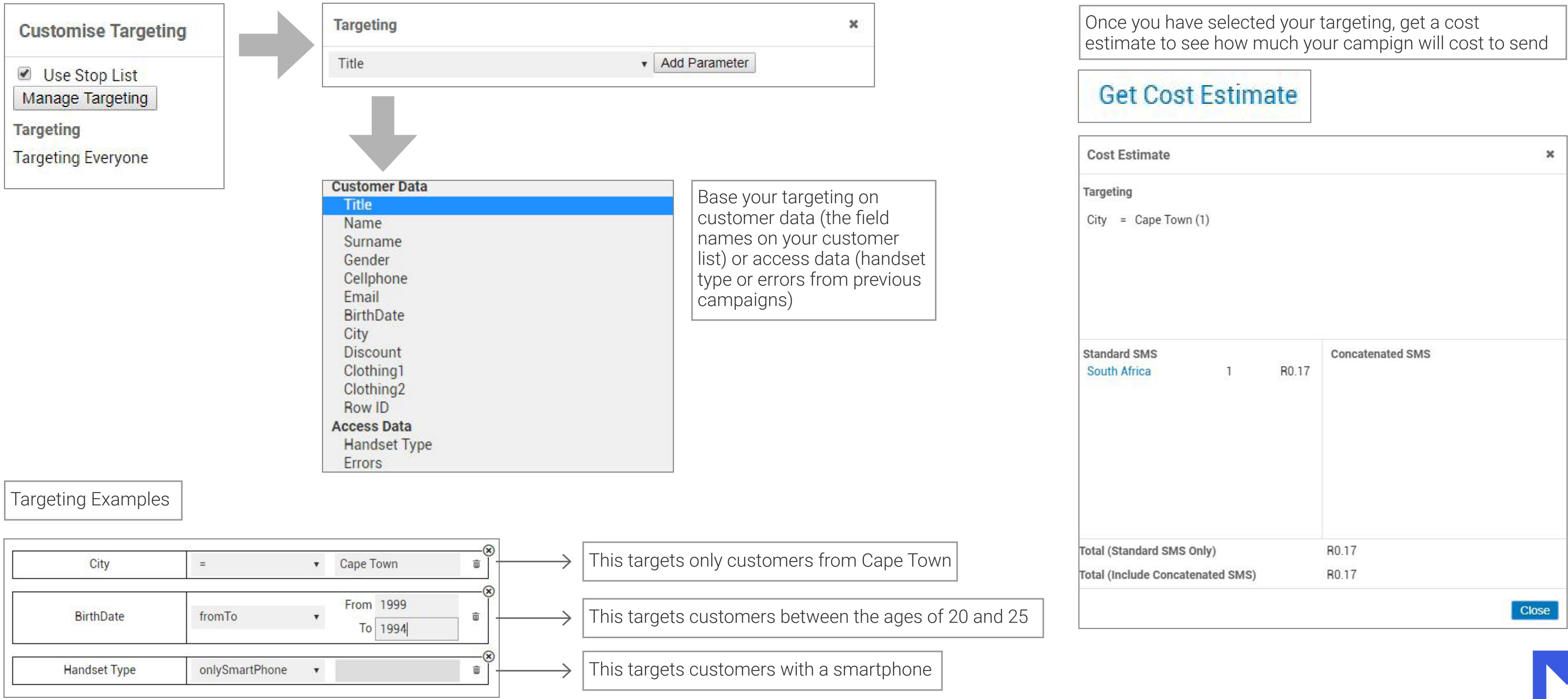
SmartSMS

Sending engagements

Engagements are when you send your SmartSMS to your customers.

Customise targeting

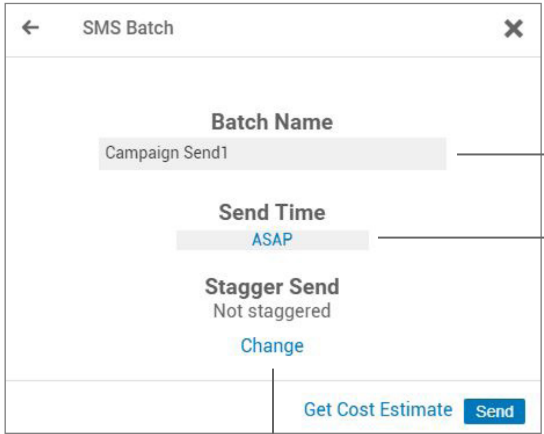
Customised targeting gives you the option to send your SmartSMS to a specific segment or segments of your customer list.



SmartSMS

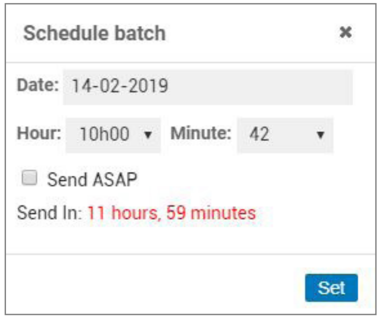
Sending engagements

Engagements are when you send your SmartSMS to your customers.

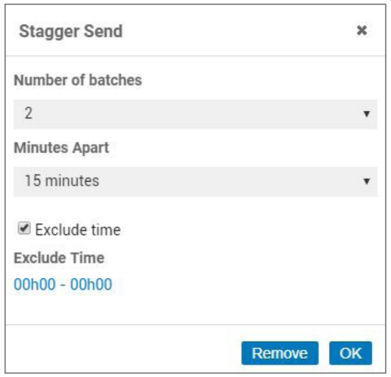


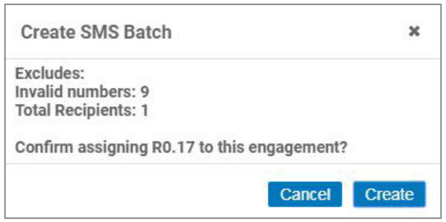
Give your campaign an appropriate name

Choose to send your campaign immediately or schedule it for later



You can also choose to stagger the send of your campaign





When you are ready to send your campaign you will be prompted to confirm the number of recipients and the cost

View your sent batches on the campaign dashboard

Accessing reports

The Mobiz reporting features enables clients to keep track of key metrics in their campaigns - users are able to track a multitude of actions performed by campaign recipients such as click through rates, page views, users inputs, external links visited and much more.

1. How to access reports

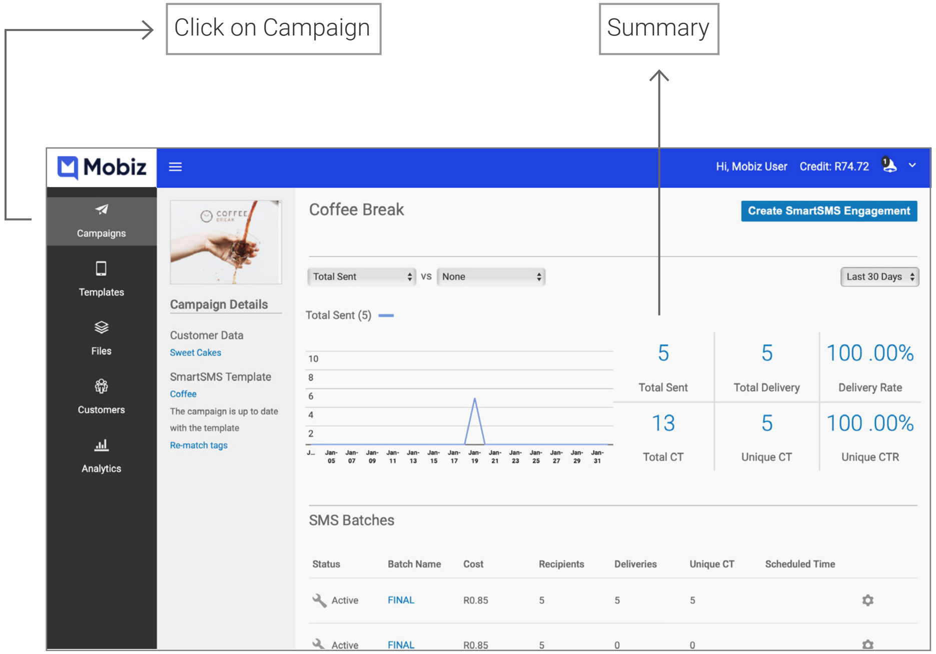
There are two ways to access reports on the platform.

A. Via the campaign dashboard

1. Login to the Mobiz platform.

2. Your campaign will be listed - select one of the campaigns.

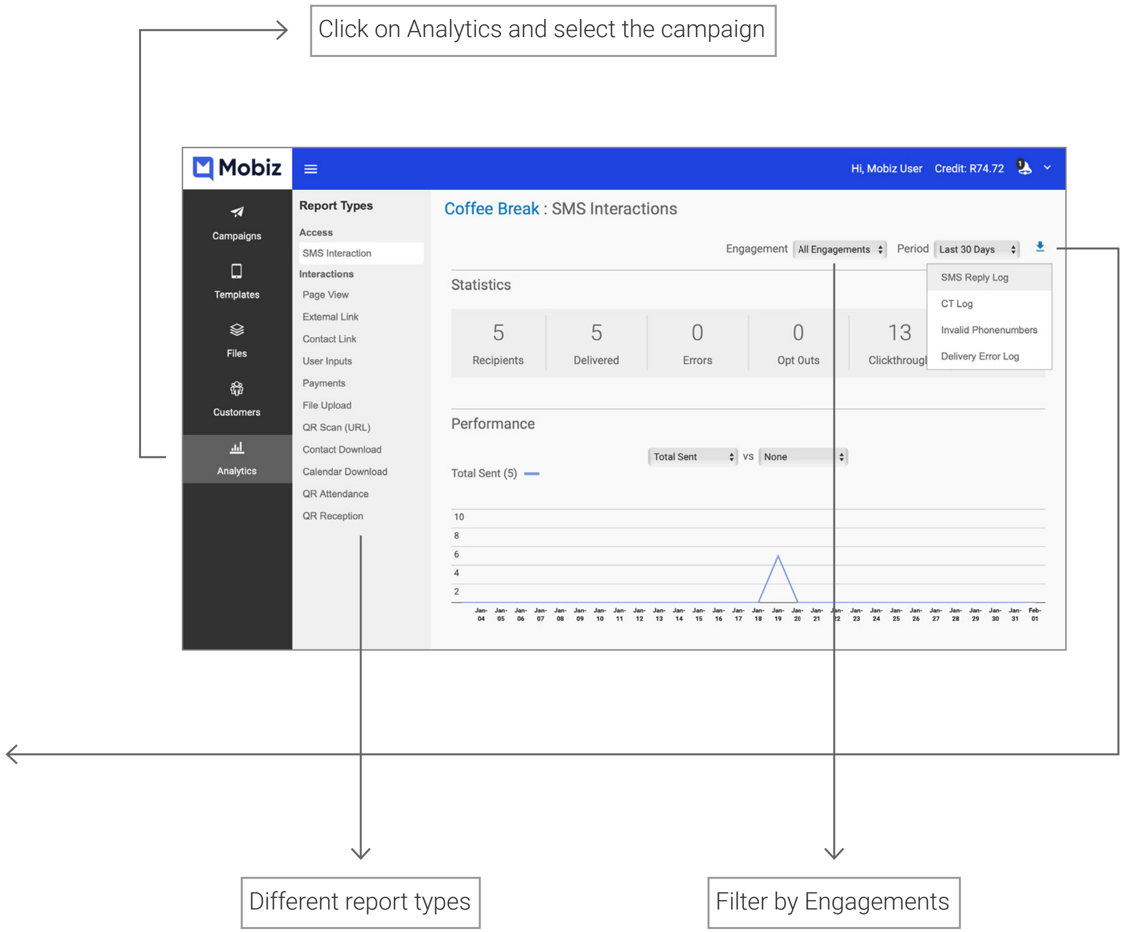
3. You will now be presented with a summary of the campaign analytics - if you click on any of the metrics a details report will be presented to you (e.g. Total Sent).



Accessing reports

B. Via the side navigation menu

1. Log in to the Mobiz platform.
2. Select Analytics from the side navigation menu.
3. Your campaign will be listed - select the campaign of interest.
4. A sub-menu will be displayed showing different report types, to the right of the main side navigation menu.
5. Select one of the these options, e.g. User Inputs.
6. Filter by Engagements and Period in the top right - Period can be one of the predefined values or a custom value.
7. Click the download button and you will be presented with a modal allowing you to customise the report further.

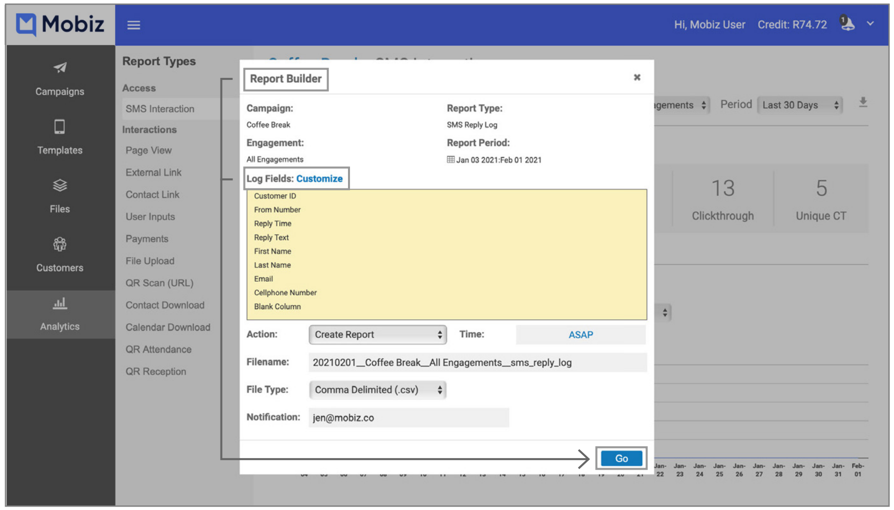


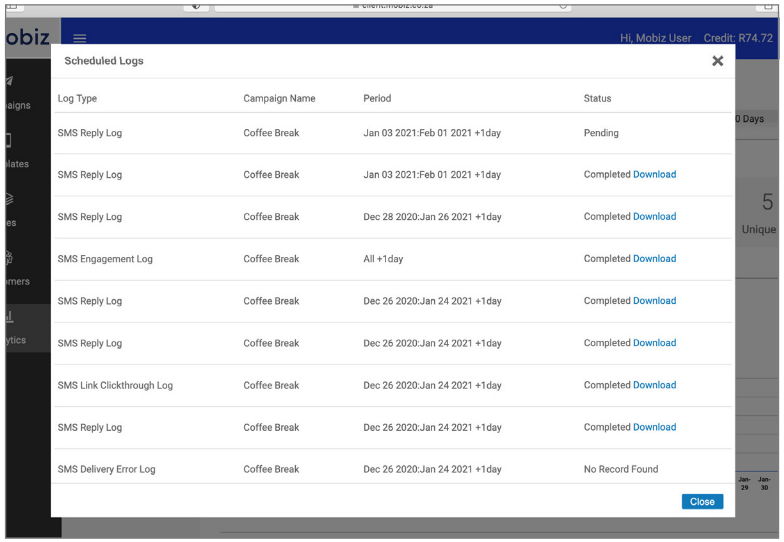
Accessing reports

2. Report Builder/Scheduled Logs

On this Report Builder modal, you can choose the fields you would like, the action you would like to perform (Create and download a report or upload a report to an FTP server), as well as the file format and name.

Once you click the Go button, a Scheduled Logs screen will then be presented to the user. Each of the logs will have a status attached to them, either Cancel or Download - once the status of the 'Download' is available you may then download the report.





Accessing reports

How to read the dashboard

When viewing the dashboard for a campaign, there are 7 metrics under the statistics section which give an overview of your campaign performance.

5	5	0	0	13	5
Recipients	Delivered	Errors	Opt Outs	Clickthrough	Unique CT

Recipients - These are the total number of recipients in the client database to which the SMS was sent.

Delivered - The total number of recipients to which the SMS was successfully delivered.

Errors - The total number of recipients to which the SMS could not be delivered.

Replies - The total number of direct replies to the SMS.

Opt outs - If the SMS had an opt out option, the total number of recipients who opted out of the campaign.

Click through rate - The total number of click throughs, i.e. clicked the embedded link in the received SMS to view the campaign.

Unique click through rate - The same as click through rate, except that duplicate click throughs by the same recipient are excluded.

Reporting types

1. SMS Interaction
When viewing the analytics page, and choosing SMS interaction from the sub-side navigation menu, then choosing the drop down on the top right, the user will be presented with various SMS interaction reports, namely:

- **Click Through Log** - A list of all recipients who clicked through, as well as the date and time which they clicked through.
- **Invalid Phone Numbers** - A list of recipients who had invalid phone numbers in the client database.
- **Delivery Error Log** - A list of delivery errors with status codes - the status codes in this report will match one of the below statuses.

2. Interactions

Page View - A template consists of one or more pages - the Page View reports allows the user to see statistics relating to which pages were viewed by recipients.

External Link - If a template contains external links, this report provides details on recipients click throughs on these links. It is important to note that this is not the link in the SMS which takes the recipient to the campaign, but rather external links embeded within the campaign itself (eg. a campaign may contain a link to the brand's Facebook business page).

Contact Link - A template may contain contact details such as a phone number or WhatsApp link - this report will provide stats on interactions with this contact link.

User Inputs - Statistics on custom inputs or form fields completed by users, e.g. Surveys or questionnaires.

Payments - Logs relating to integrated payments made within a campaign via one of the Mobiz payment partners.

File Uploads - Details on any files uploaded by recipients via the campaign, e.g. a user may have been asked to upload a copy of their ID.

QR Scan (URL) - Oftentimes campaign landing pages can be accessed via a QR code rather than via an SMS with a link - this report provides details on campaigns accessed via users scanning a QR code.

Contact Download - If any contact details are embedded within a campaign, this report would provide statistics for downloads of this contact - this differs to the Contact Link report explained above and is more analogous to one user sharing contacts via their cellphone.

Calendar Download - Calendars containing dates relevant to a campaign (e.g. a campaign may contain a calendar highlighting days when stores may be running a special) - this report would provide details on recipient downloads of this calendar.

Delivery status

The below table details the various delivery statuses, as well as what each status means.

DELIVRD - Refers to the successful submission of the SMS to the handset. The cellular network reports the status.

UNDELIV - Refers to the unsuccessful submission of the SMS to the handset, caused by inactive or unreachable numbers. The cellular network reports the status.

EXPIRED - Refers to no status update being received within the validity period. This is usually caused by the handset being off, going to voicemail, being redirected, or the handset being out of network reach.

SUBMITD - The SMS has been submitted to the cellular network for delivery. We are waiting for a status update from the cellular network.

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