

HOW TO

Set up a Recurring Campaign

Background

Recurring campaigns are useful if you would like members to automatically receive a campaign when an event happens (e.g. for a member's birthday) or when a member gets to a particular state (e.g. a member hasn't been to the theatre in 90 days).

This generally follows the same process as setting up a one-off loyalty campaign, however, there are some changes that need to be made.

Key Terms

- **Recurring Campaign:** a type of campaign that is sent automatically over a predetermined time period and select days of the week
- **Tags:** labels for groups that can be used for segmentation or reporting, e.g. 'kids', 'Disney'
- **Contactable Members:** members with a valid email address (and/or phone number) and who are subscribed to a subscription category
- **Snapshot:** saves the logic you have used to segment your audience, not the number of members returned. It can get re-used for multiple campaigns
- **Loyalty Codes:** set up as 'manual recognitions' in Vista Loyalty with an external code associated to them

Where to find

- 1 Hover over 'Engage', click on 'Campaigns'
- 1 Click on the 'Create' button in the top right
- 2 If you want to target members, select 'Loyalty Campaign' as 'Style'
- 3 Select 'Recurring' as 'Type'
- 4 Enter a name for your campaign
- 5 Click the 'Create' button to create your new recurring campaign

How to edit

- 6 Click on the campaign name under the 'All' or 'Configure' tab to edit it
- 7 Edit the settings:

Tags

Tags are not required in order to deploy a campaign but we highly recommend that you use them to allow for easy searching or grouping. Tags can be added after your campaign has been deployed

- a) Enter one/more tags into the field (e.g. movie name, distributor, month of campaign execution, F&B). These will save automatically

General (required)

This section must be completed in order to execute a campaign

- a) Enter a brief 'Description' about the nature of the campaign for future reference and other individuals working on the campaign
- b) Choose a 'Subscription Category' – unsubscribes from the campaign will get applied to this subscription category
- c) Select a 'Send Mode' for your campaign: email, SMS, silent, or push
 - Silent campaign: applies rewards/loyalty points to a members account without contacting them
- d) Choose a 'Loyalty Rewards Mode':
 - Contactable Members: send loyalty points/codes only to recipients who have a valid email address (and/or phone number) and are subscribed to the associated subscription category
 - Every Member: send loyalty points/codes to all members in the campaign snapshot(s)
- e) Under '[Control Group](#)' we strongly recommend using 'Auto Calculate' to calculate your control group. See our [user manual](#) for more details
- f) Under 'Advanced' you can enter the number of times a member can receive this campaign and associated offers

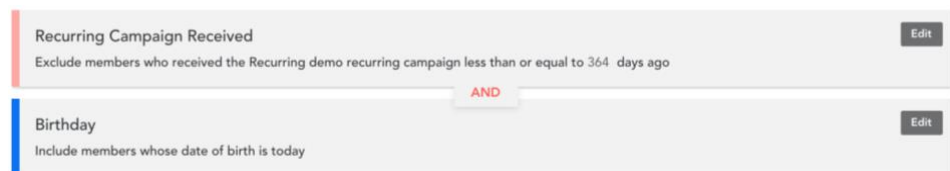
Recipients (required)

You must select one or more snapshots for the recipient list. Use snapshots you created in Group Builder

a) Start typing the name of your snapshot until an option appears

b) Add the snapshot by clicking the '+' button

- Ensure to include an exclusion filter in your selected snapshot that restricts how frequently members should receive this campaign (e.g. no Birthday campaigns more than once every 364 days)
- Modify the snapshot within Group Builder to include either the 'Campaign Received' or 'Recurring Campaign Received' filters



c) Click 'Save' to confirm your changes

Loyalty Points

This section is not required to deploy a recurring campaign if the campaign does not include rewarding points.

Note, if a member needs to do something in return for points (e.g. visit the cinema today to get 50 bonus points), do not add points in the invitational campaign. Contact your Account Manager for assistance.

a) To apply loyalty points, simply enter the number of points and balance type you want to apply

b) Under 'Advance' you can enter the number of points this campaign can apply per day

c) Click 'Save' to confirm your changes

Loyalty Codes

This section is not required to deploy a campaign. Loyalty Codes are set up as 'manual recognitions' in Vista Loyalty with an external code associated

- a) For manual recognitions, enter the external code in the first field
- b) In the second field, enter the number of offers per recipient. E.g., if all recipients will receive one free popcorn offer, enter '1' in the field



The screenshot shows a 'Loyalty Codes' section with a table. The table has two columns: the first for the code and the second for the number of offers. One row is present with the code 'freepopcorn' and the value '1'. To the right of the table is a '+ Add' button. Below the table, it says 'No loyalty codes defined.'

- c) Click the '+' button to add your manually entered loyalty code

Email (required)

This section is required for email and SMS, however not for silent campaigns

For Email:

- a) Enter 'From Name' for your sender
- b) Fill out the 'Email Subject' and 'Email Preheader'
- c) Click 'Open Editor' to create and edit your content. Find more details [here](#)
- d) Use 'Simulate Recipient' and 'View Emails' to check how your email will get send out. 'Save' your changes

Delivery (required)

- a) Choose the 'Start Date' for your first recurring campaign to be sent
- b) Enter a specific 'End Date' or keep as indefinite by choosing 'None'
- c) Choose which days of the week this campaign should be sent on
- d) Enter the 'Scheduled Time' of day that the campaign should get sent
- e) Select whether this campaign should adjust to each member's time zone
- f) Confirm your changes with 'Save'

How to test

- a) Select test candidate that should get the test campaign
- b) Click 'Send Tests'

How to Execute

- 8 Once all required sections are completed, click 'Deploy Campaign' at the bottom of the page. A pop-up execution checklist presents an overview of your campaign configuration for final review before executing
- 9 Press the execute button to finalize the campaign's deployment