

Payments to grow your world

Worldline Smart Engage

Back-office user manual



Content table

1. What is Worldline Smart Engage?

2. Starting with Smart Engage

3. Connecting terminals to back office

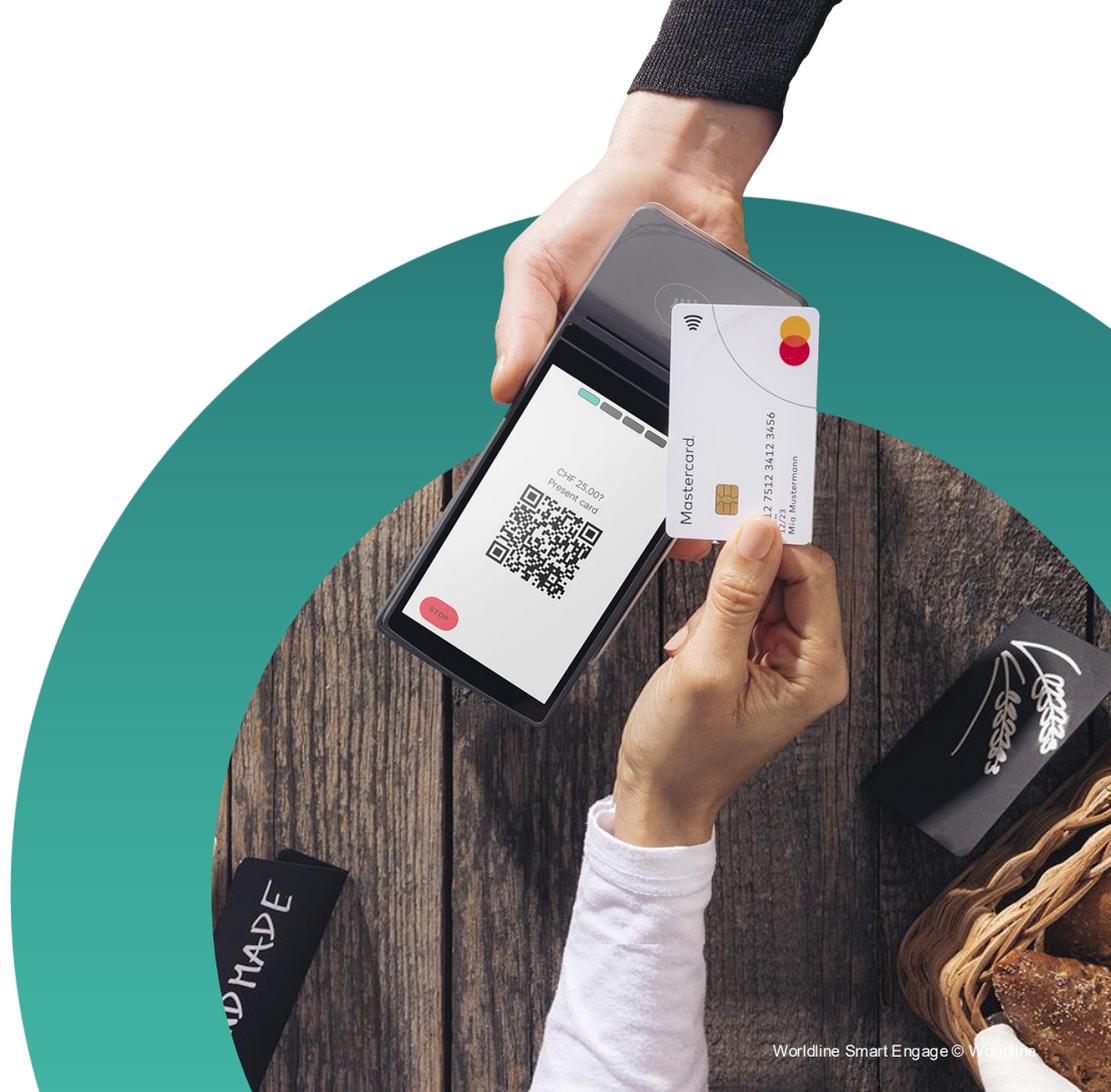
4. Creating an ad

- Glossary
- Creating a new scenario
- Adding screens to the scenario
- Defining delay between screens appearance
- Defining flow of the scenario

5. Different screen types

6. Creating campaign

- Creating campaign
- Defining triggering parameters
- Prioritizing campaign



What is Worldline Smart Engage?

A few important information good to know before using Worldline Smart Engage

Worldline Smart Engage is a service provided by Worldline that allows you to conduct customer surveys using payment terminals. It is compatible with Ingenico and Castle payment terminals, enabling you to gather feedback during the check-out process. The Smart Engage service consists of two components:

1. **Smart Engage App**, which is automatically installed on your payment terminal after onboarding SmartPOS. It allows you to collect customer feedback through various survey formats.
2. **Back Office Online Service** which you can use for setting up surveys, managing campaign workflows, and analyzing the gathered data.

As a merchant, you can create surveys and campaigns through the back office, linking them to the terminals to initiate surveys. Depending on your campaign configuration, survey campaigns can run before or after the payment.

The system supports a variety of survey question types and allows you to customize the flow of questions based on customer responses.

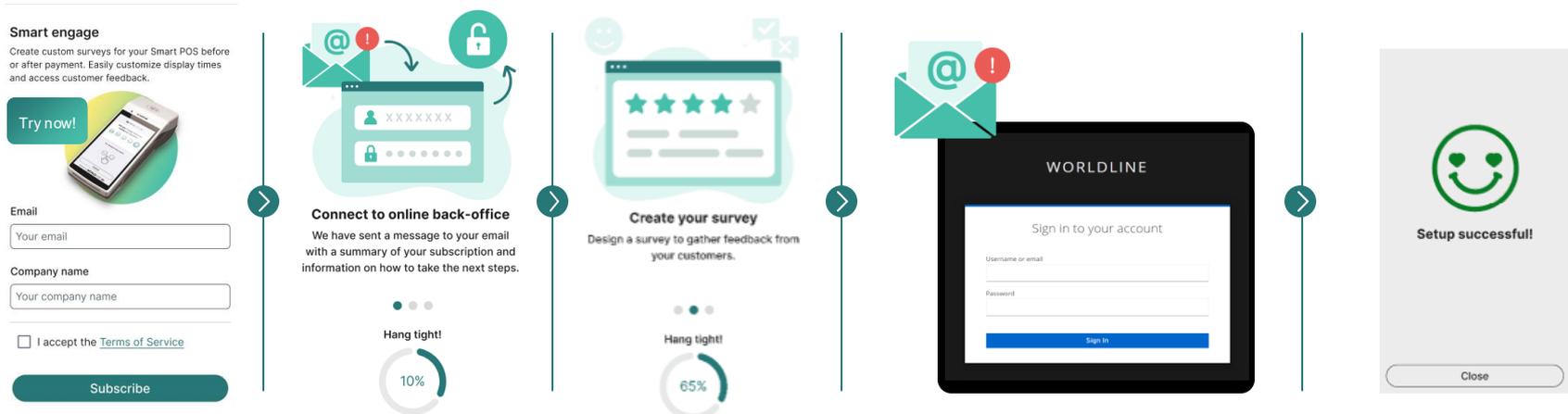


Starting with Smart Engage

Create your Smart Engage account

1. Open the app and follow the steps to create your account. A confirmation email will be sent to your registered email address.
2. Click the link provided in the email to access the back office, where you can log in using the credentials you set up within the app.
3. If you have multiple terminals, you can log in directly on each of them through the app to connect them to your account.

If you've already set up an account for Worldline POS Advertising, you can use those existing credentials to log in immediately.

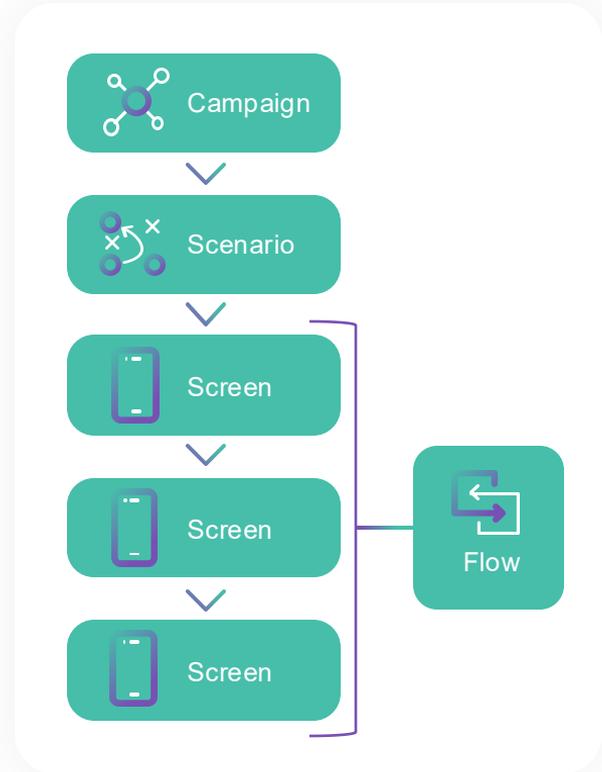


Creating an survey

Glossary

Key terms related to the Worldline POS Advertising system to help you understand its features and functionalities.

- **Campaign:** An organized collection of surveys in the Smart Engage system designed to collect feedback from customers. A campaign is scheduled over a specific time frame and you can implement multiple surveys at designated times and locations.
- **Scenario:** A specific arrangement of survey questions (screens) that outline how feedback will be collected. Scenarios can include one or multiple screens, and a single scenario can be used across various campaigns.
- **Screen:** The individual questions or prompts shown to customers during the survey process. Various types of screens can be utilized, including Yes/No, Smiley, Stars, Extended-choice, QR-code, and Info screens, each designed for specific purposes.
- **Flow:** The order in which screens are displayed based on customer responses. Setting up the flow allows for dynamic adjustments depending on how the customer interacts with the previous screens.



Creating a survey (1/3)

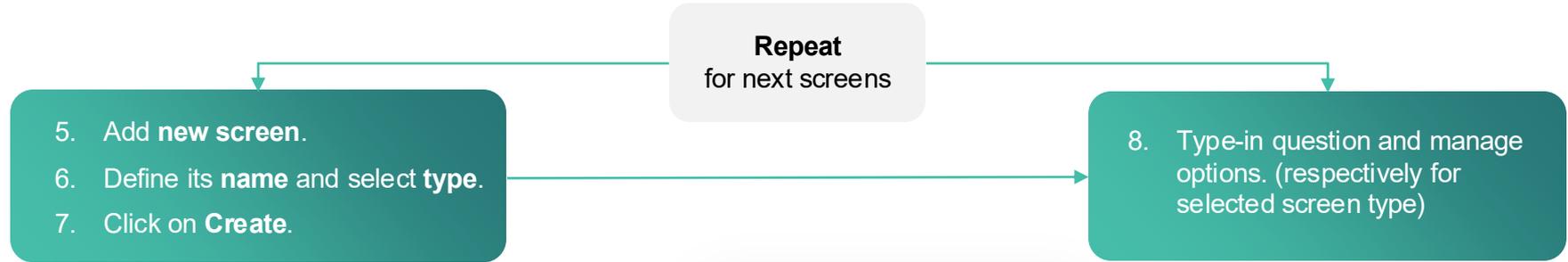
Create a new scenario

1. Select the **Scenario** tab in the left menu of the back office.
2. Select **Create a new scenario**.
3. Define the **scenario name**.
4. Click **Validate** to proceed.



Creating a survey (2/3)

Create a new scenario



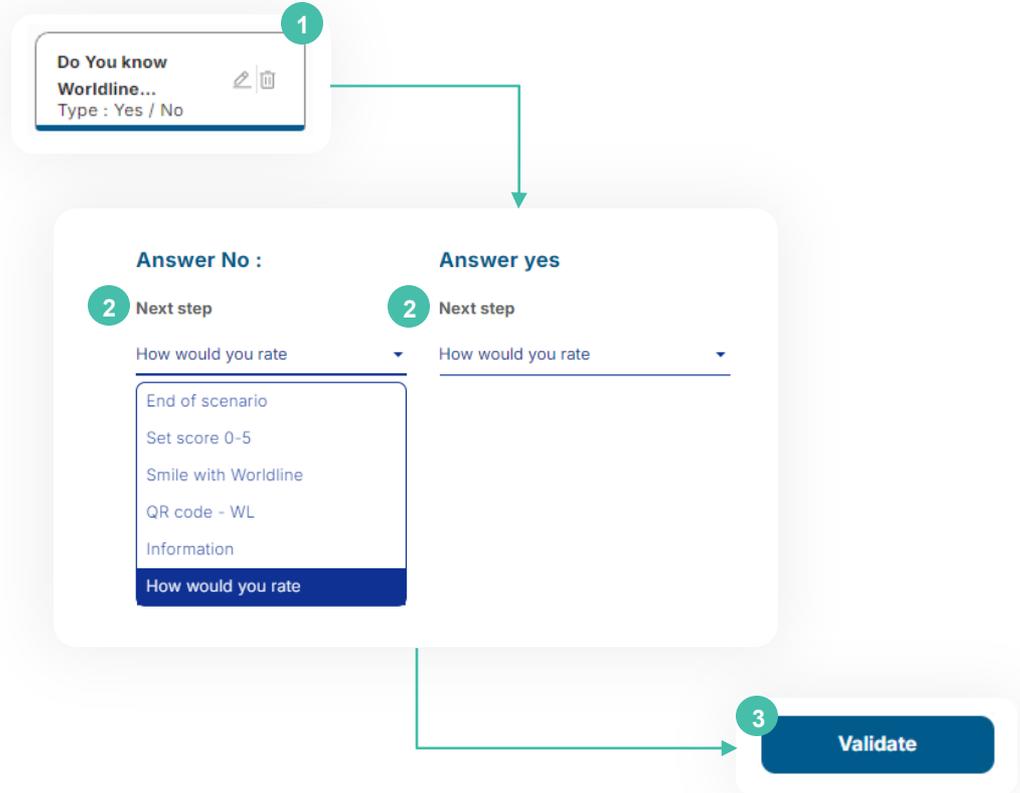
The screenshot shows the "Add new screen" form. At the top, there is a green circle with the number "5" and a blue button with a plus sign and the text "New screen". An arrow points from this button to the form. The form has a title "6 Add new screen" and two input fields: "Name*" with a character count "0 / 50" and "Type*" with a dropdown menu showing "Yes / No". At the bottom, there are two buttons: "Cancel" and "7 Create".

Creating a survey (3/3)

Defining flow of the scenario

1. Use **Edit** mode (marked with a pen icon) for the created screens to establish the scenario flow.
2. Using dropdown options available below each answer in the screen view **select the next screen** that should appear after the customer provides their response on the terminal.
3. Submit the changes by clicking **Validate**.

Note: All responses for the same screen can have the same next screen chosen for display.



Screen types

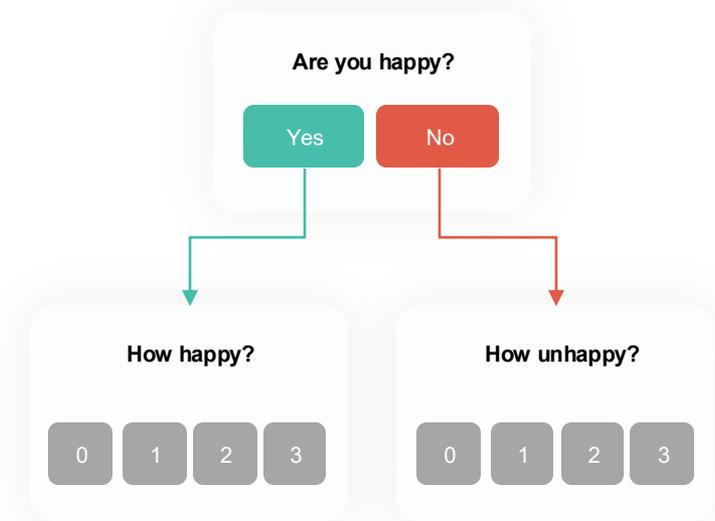
Smart Engage provides the option to use various screen (question) types to create a survey scenario. The scenario can contain either a single screen or multiple screens, depending on the topic and requirements.

Screen Types:

- **Yes/No:** A straightforward two-option question format.
- **Smiley:** A three-option question format that uses smiley faces to assess customer sentiment.
- **Stars:** A rating system that enables customers to evaluate experiences on a scale (e.g., 1 to 5 stars).
- **Extended-choice:** A screen that provides multiple response options for more detailed feedback.
- **QR Code:** A screen that directs customers to additional resources or surveys outside the terminal.
- **Info:** A screen that directs customers to additional resources or surveys outside the terminal.

The respective screens may be combined into **one flow using answer options referrals**.

For example, the answer **Yes** in the first screen may lead to screen 2 and the answer **No** may lead to the screen 3 etc.



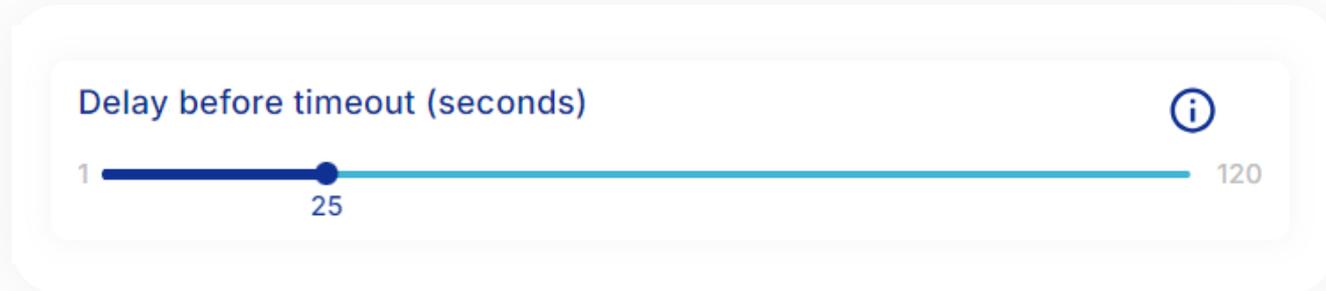
Defining delay between screens appearance

Creating first survey

The survey may be automated for screen appearance meaning the screens will be displayed consecutively. Alternatively, the entire survey may **automatically** terminate (based on the provided scenario) if the user does not respond.

Each screen may have a different delay (defined in seconds) after which the next screen will be displayed. The delay can be set anywhere from 0 to a maximum of 120 seconds.

The delay establishes the maximum time allowed for answering the question.



Different screen types (1/6)

Yes/No Screen

Yes/No questions are used for closed questions, with each answer directing to the next step or ending the scenario; the same applies to timeouts.

Scenario

Do You know Worldline services?

Type : Yes / No

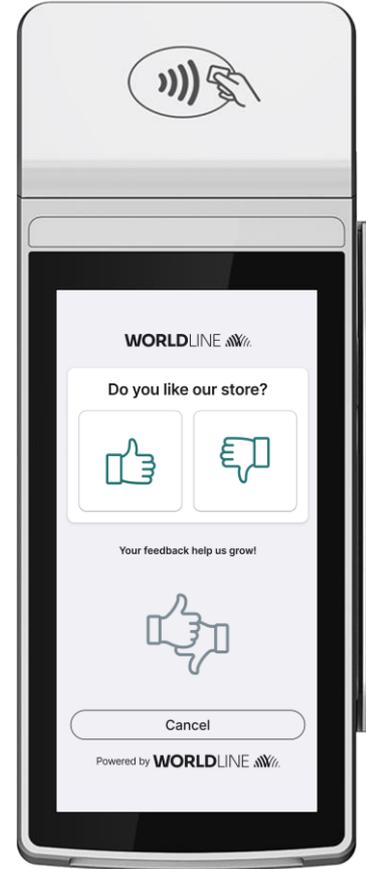
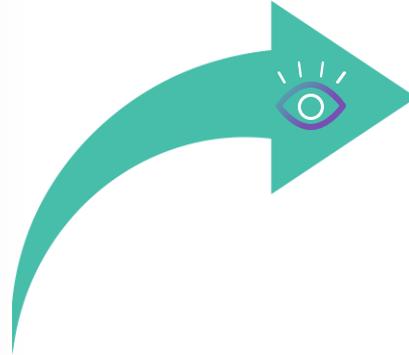
Set as first screen ⓘ

Description*

Do You know Worldline services? 31 / 255

Image file name 0 / 255

Answer No :	Answer yes
Next step	Next step
How would you rate	How would you rate



Different screen types (2/6)

Stars screen

Star rating lets users select 1 to 5 stars, with each choice guiding to the next step or ending the scenario. This allows different follow-ups based on the score or customer satisfaction. The same applies to cancellations or timeouts.

Scenario

How would you rate

Type : Stars

Set as first screen ⓘ

Description*

How would You rate Worldline services? 38 / 255

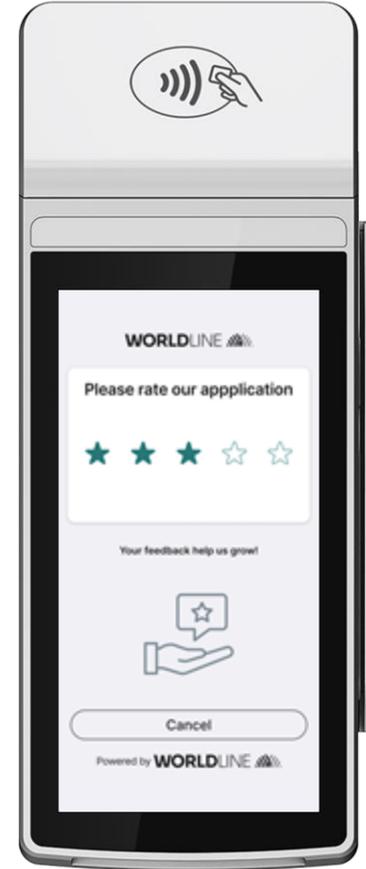
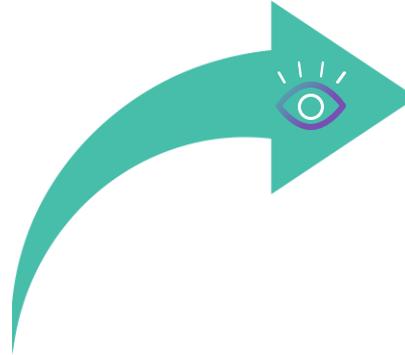
Image file name 0 / 255

Validate Button

Next step
★☆☆☆☆
Smile with Worldline

Cancel Button:

Next step
End of scenario



Different screen types (3/6)

Smiley screen

The Satisfaction request gauges the user's mood with three options; each leads to the next screen or the scenario's end. The same applies to timeouts.

Scenario

Smile with Worldline

Type : Smiley

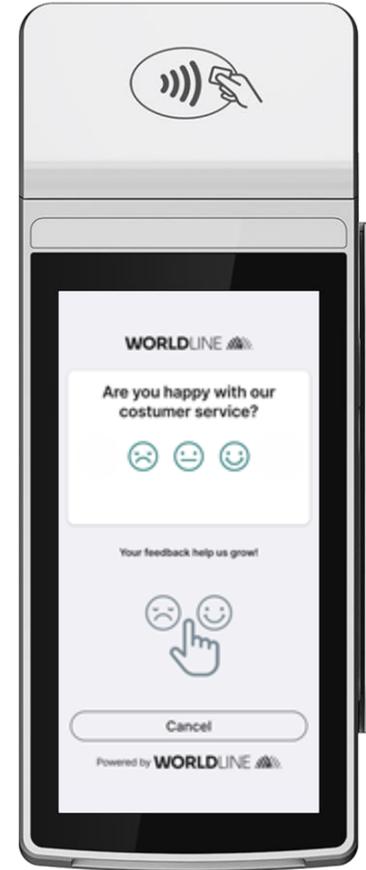
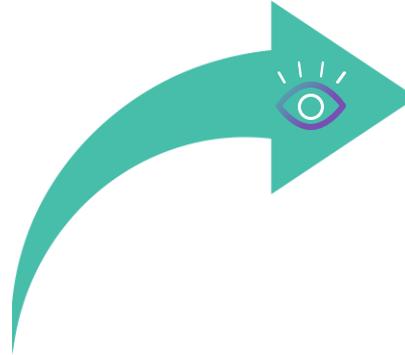
Set as first screen ⓘ

Description*

Are You satisfied with the Worldline level of support? 54 / 255

Image file name 0 / 255

		
Next step	Next step	Next step
Set score 0-5	Set score 0-5	Set score 0-5
<input type="button" value="Cancel"/>	<input type="button" value="Preview"/>	<input type="button" value="Validate"/>



Different screen types (4/6)

Extended-choice screen (Scoring)

Allows users to rate from 1 to 10, with the maximum number shown on the screen selectable. The next step is the same for all choices.

Scenario

Set score 0-5

Type : Scoring

Set as first screen ⓘ

Description*

In how many countries have you encountered Worldline services?

62 / 255

Image file name

0 / 255

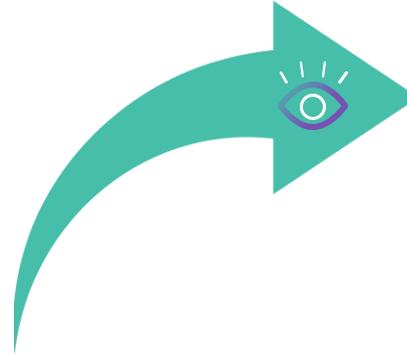
Max score

4

Next step

QR code - WL

Cancel Preview Validate



Different screen types (5/6)

QR-code screen

Displaying a QR code presents a URL (mandatory, max 255 characters) that can be scanned for more info, such as sales, promotions, or social media links. The "Show buttons" box is checked by default to display Validate and Cancel buttons. The acknowledgement defines the next step or end of the scenario, including for timeouts.

Scenario

QR code - WL

Type : Qr-Code

Set as first screen ⓘ

Description*

Scan the QR code to visit Worldline.com 39 / 255

Image file name 0 / 255

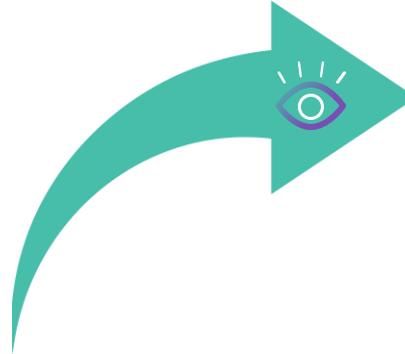
URL*

Enter URL

<https://docs.smartpos.worldline-solutions.com/smartpos/worldline-com-QR.png>

Show Buttons. ⓘ

Cancel Preview Validate



Different screen types (6/6)

Info screen

The Information screen delivers a message to the user, such as a closing message or upcoming promotion. The "Show buttons" box determines whether Validate and Cancel buttons are displayed. The acknowledgment sets the next step or scenario end, including for timeouts.

Scenario

Information

Type : Information

Set as first screen ⓘ

Description*

This survey was created with Worldline Smart Engage application!
The app is available for the Ingenico Move and Lane payment terminals (TETRA) as well as the Castles Saturn (ANDROID).
More to come soon!

202 / 255

Image file name

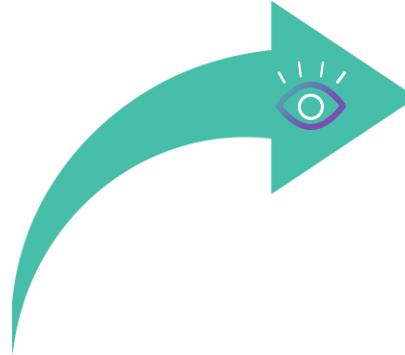
0 / 255

Delay before timeout (seconds) ⓘ

1 ————— 120

25

Cancel Preview Validate

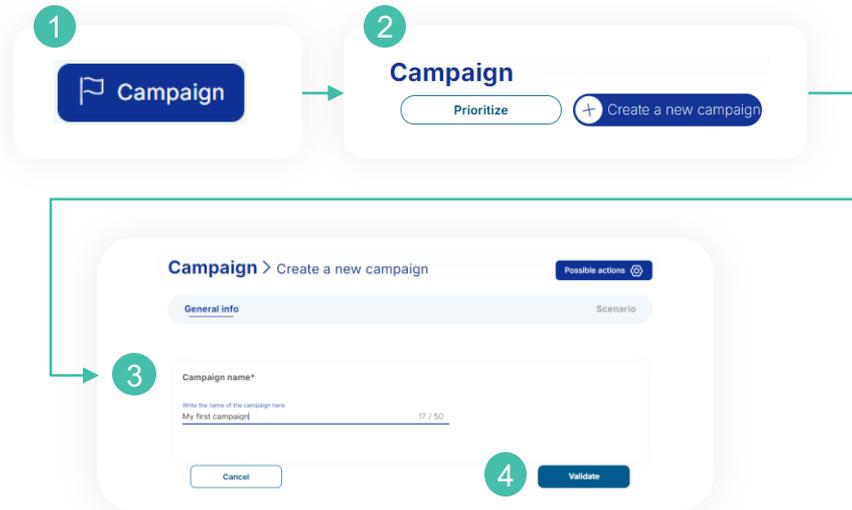


Tip: set the answer referrals (scenario flow) after all screens are defined

Defining campaign (1/2)

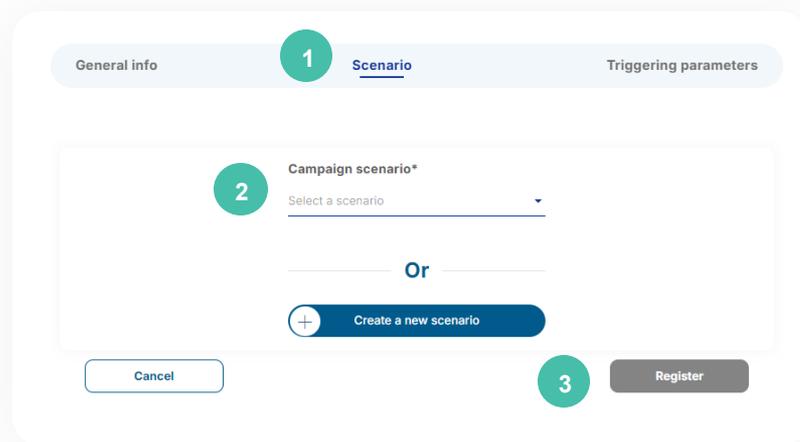
Defining screens for the scenario

1. Select the **Campaign** tab in the left menu of the back Office.
2. Select **Create a new campaign**.
3. Fill-in the **campaign name**.
4. Click **Validate** to submit and proceed to the next step.



Define scenario:

1. Choose **Scenario** from the Campaign submenu.
2. Select scenario from the list or Create a new one
3. Click **Register**.



Defining campaign (2/2)

Defining triggering parameters

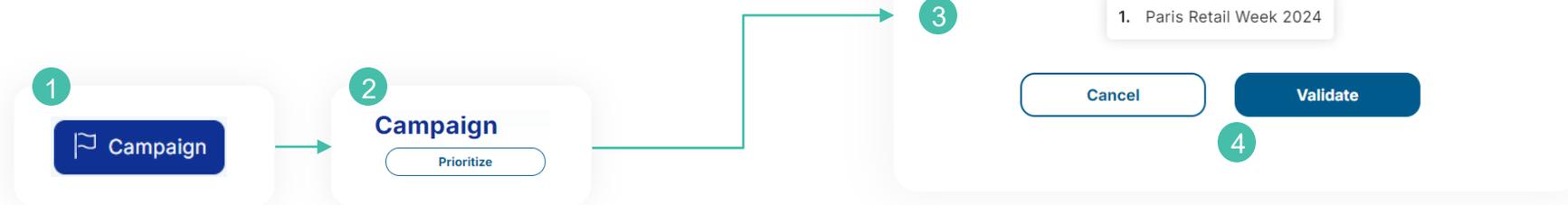
1. Select **Trigger parameters** from the campaign submenu.
2. Set a **timeslot**, the **days**, then the start and end **hours**.
3. Select the **Shop** (one or more).
4. **Save**.

The screenshot shows the 'Triggering parameters' configuration screen. At the top, there are three tabs: 'General info', 'Scenario', and 'Triggering parameters' (highlighted with a green circle '1'). Below the tabs, there are two date selection fields: 'CAMPAIGN START DATE*' and 'CAMPAIGN END DATE', each with a 'SELECT DATE' button and a calendar icon. The 'Days' section features a row of buttons for 'Monday', 'Tuesday', 'Wednesday', 'Thursday', 'Friday', 'Saturday', and 'Sunday', with checkmarks on the first five. The 'Activation slots' section has a sub-section 'Select a start and end time' with a checked 'All day' option. Below this are 'Start' and 'End' time pickers set to '12:00 AM' and '11:59 PM' respectively, and an 'Add a slot' button. The 'Shops' section has a 'Select a shop' button with a green circle '3' next to it. The 'Trigger mode' section has three radio buttons: 'Before payment', 'After payment' (selected), and 'From the checkout'. The 'Transaction amount (in local currency)' section has two input fields for 'Minimum amount' and 'Maximum amount', each with a currency symbol. At the bottom, there are 'Cancel' and 'Save' buttons, with a green circle '4' next to the 'Save' button.

Prioritizing campaign

Multiple campaigns can be active at the same time. To prevent potential conflicts regarding which campaign should be available on the terminals at any given time, the back office provides the option to set an appropriate priority.

1. Select the **Campaign** tab in the left menu of the back Office.
2. Select **Prioritize**.
3. Select the campaign from the list.
4. Validate.



Thank you.