

convey  | Engage

NEW FEATURE GUIDE

Configurable Alerts



Introducing Configurable Alerts

Convey Engage introduces the ability to configure consumer alerts, giving you a simple way to customize the consumer outreach strategy while keeping our brand voice consistent and relevant. Configurable alerts enable you to increase operational efficiencies by leveraging real-time delivery data to influence when, where, and why consumers should receive tracking alerts.

Convey Engage is our comprehensive consumer communications solution for post-purchase shipment alerts and order visibility. Configurable Alerts provide proactive capabilities in the form of triggered SMS and Email alerts. Retailers gain access to a shipment lookup table for responding reactively to inbound calls from consumers.

OVERVIEW

What are Configurable Alerts? Alerts are both text messages (SMS) and emails, sent directly to the consumer to help keep them informed of their shipment progression and order status. These alerts are managed by the system admin in the 'Alerts Center' within the Convey application.

With Configurable Alerts, you can:

- **Increase Brand Presence** | Control the language and formatting of consumer alerts
- **Expand Reach** | Define alert templates per brand and locale
- **Improve Customer Experience** | Include specific order, shipping, carrier and consumer information
- **Reduce WISMO** | Proactively notify consumers about expected delays when an exception is detected

HOW IT WORKS

Convey's data availability enables retailers to not only send alerts, but to manage the content of the alerts in a way that's most relevant to the concern at hand. Thanks to carrier exception mapping, the data Convey captures and makes available to you is what powers the alerts to be triggered; making it easy to inform the customer when an exception happens or milestone is reached.

Additionally, you can leverage this intel to power comprehensive info within the alert itself, such as, products in shipment, destination address, estimate delivery dates and more.

Below explains the different types of configurations supported:

Convey Configurations

- **Rules that trigger alerts to be sent** | This functionality allows Convey and the system administrator to define a set of rules based on issues regularly addressed.
- **Contact email & SMS number** | This rule allows for consumer contact information to be gathered and stored as a destination for future alerts.

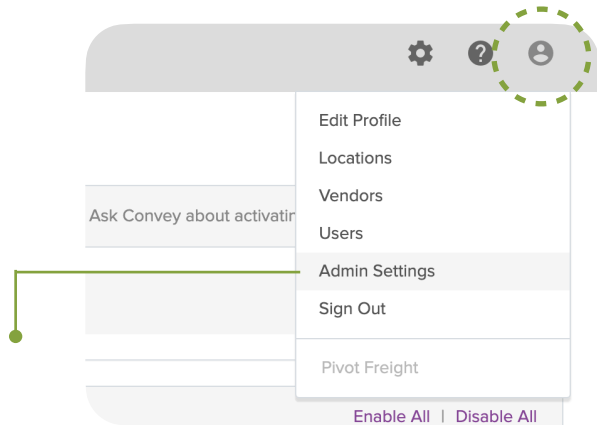
Retailer Configurations

- **Enable/disable alerts per brand and country** | Determine which type of alert is needed based on location, region and even language.
- **Brand logo** | Include your brand logo is present in communications.
- **SMS message content** | Define the content within each test message.
- **Email subject** | Define the email subject of each alert type.
- **Email layout** | Determine the look, feel and format of email messages.
- **Email content** | Define copy and verbiage used in email messages.

GETTING STARTED

To start using configurations:

- Navigate to the Profile Avatar located in the upper righthand section of your screen.
- Select **Admin Settings** from the dropdown menu.



Next, select **Alerts** from the lefthand navigation panel. This page is divided into two sections: **Global Settings** and **Transit Alerts**.

A screenshot of the 'Admin Settings' page in the Convey system. The left navigation panel has 'Alerts' selected and highlighted in pink. The main content area is divided into 'Global Settings' and 'Transit Alerts'. The 'Global Settings' section includes 'Header Styles and Footer Content'. The 'Transit Alerts' section lists several alert types with their status (Enabled/Disabled) and a toggle icon. A green line points from the 'Alerts' menu item to the 'Global Settings' section. Another green line points from the 'Enabled' toggle for the 'Delivered' alert to a callout box.

Any change made in **Global Settings** will be applied to all of your alerts.

Enable or disable the alert with the toggle icon.

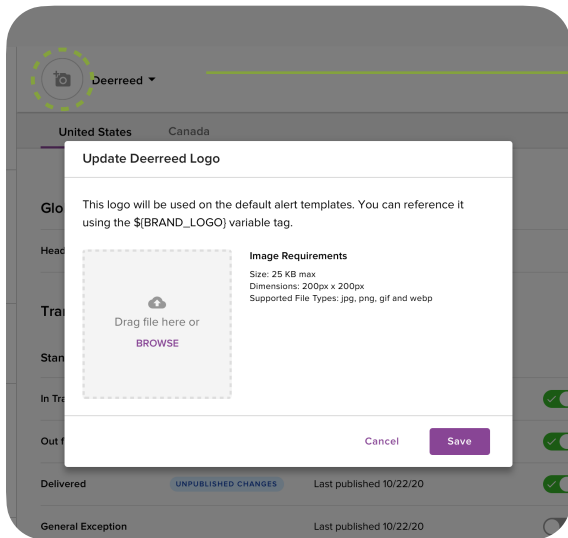
Enable Alert

Are you sure you want to enable this alert? Customers will receive notifications when their shipment matches the rules for this alert.

Heads up! There are unpublished changes for this alert that will not be enabled.

Cancel **Enable**

GLOBAL SETTINGS



Upload Your Logo

- Upload a logo that will be used on the default alert templates.
- Click the camera icon.
- Upload a file from your computer or drag-and-drop a file into the modal.
- Select 'Save' when done.
- Toggle between different brands to support multiple accounts.

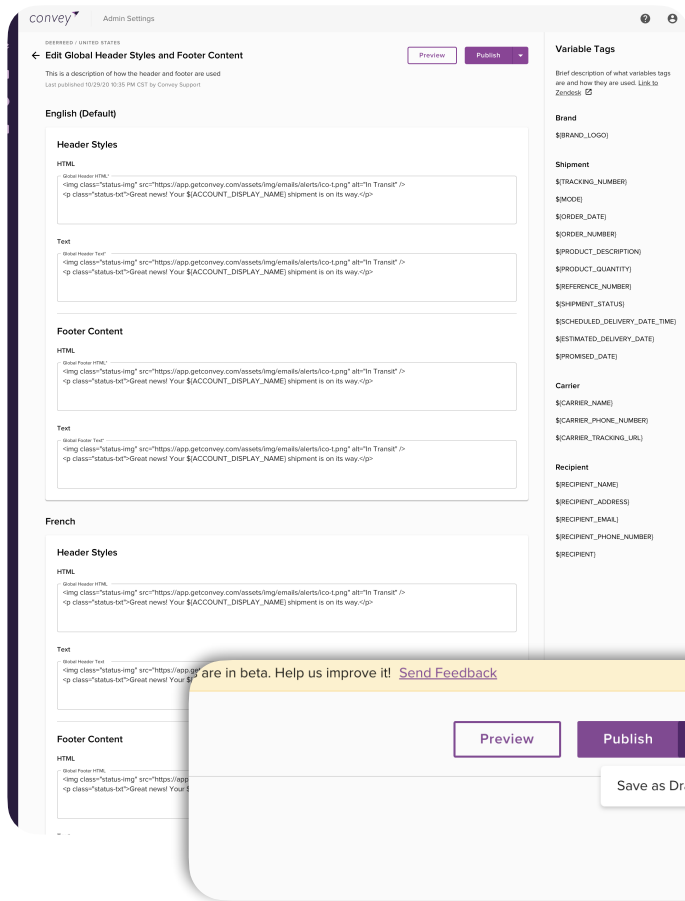
Edit Header Styles & Footer Content

In edit mode, you can adjust and customize the alert template:

- HTML global header
- Global header text
- HTML global footer
- Global footer text
- Localization available

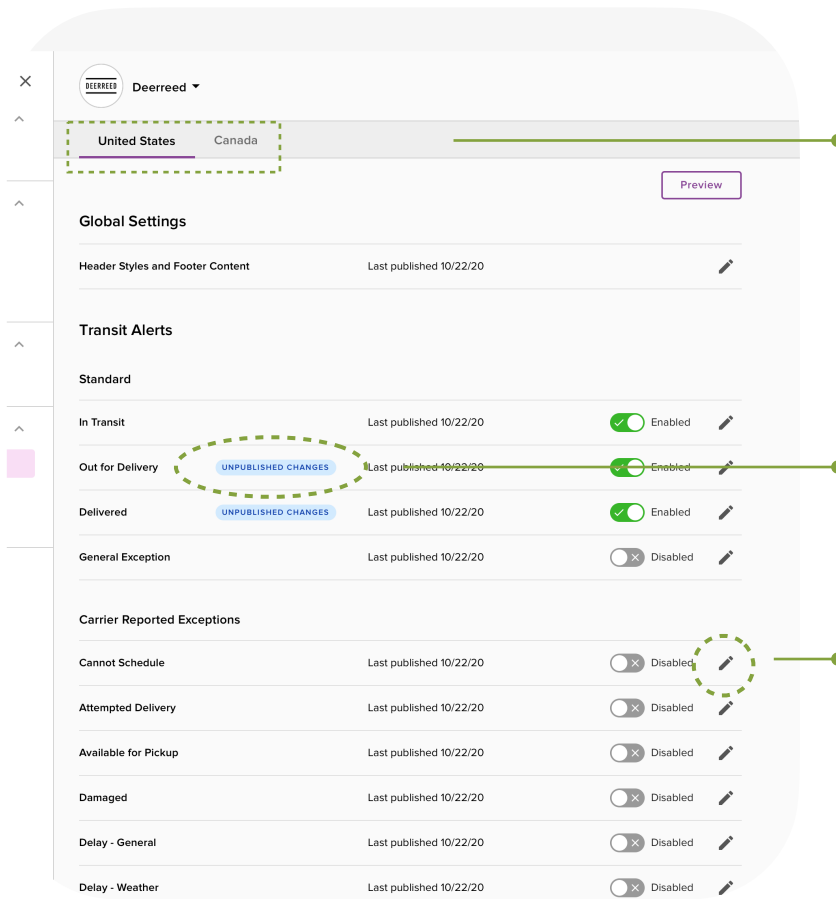
Variable Tags are located in the righthand menu panel. The data here can be directly pulled into the body of the email.

Review changes by selecting the 'Preview' button.



Select the 'Publish' button to apply changes or toggle to Save as Draft.

TRANSIT ALERTS



Transit Alerts will list all of the alerts available, and when they were last updated.

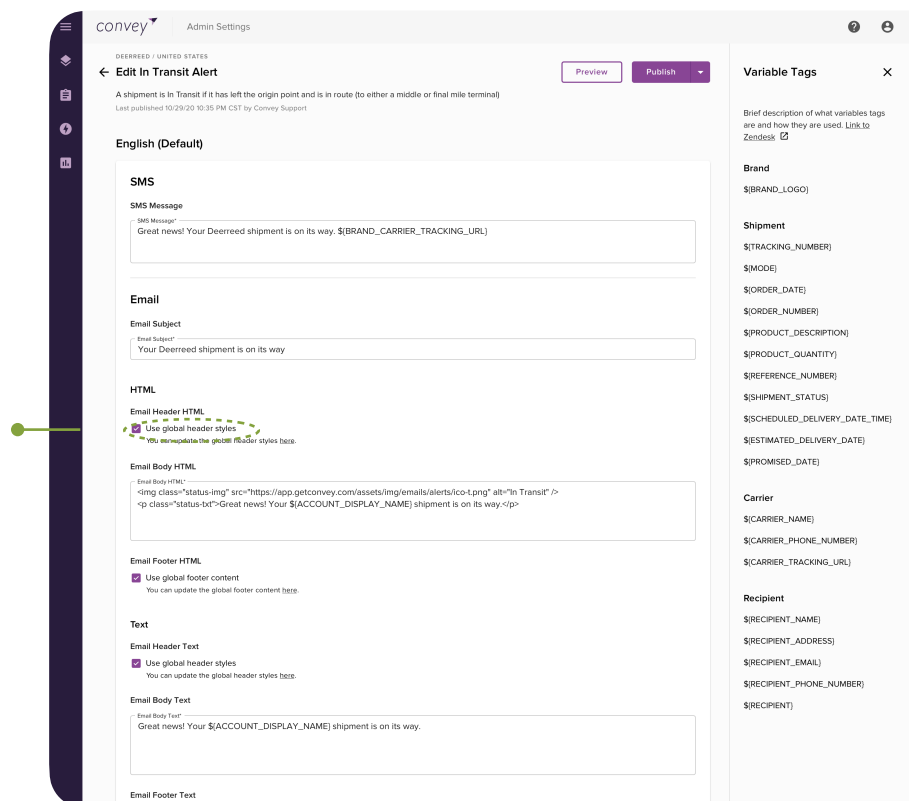
- Select the country where changes should apply.
- Review, update and manage templates still in draft mode. A blue ‘unpublished changes’ tag will appear where an alert template is still in draft.
- Click the pencil icon to update content.
- Preview from the Settings page will show what is live to your consumers, not the draft changes in edit mode.

Edit Alert Templates

In Edit Mode, define custom:

- SMS Messages
- Email Subjects
- Email Body HTML
- Email Body Text

Select ‘Use global header styles’ to apply the standard header to your template. Deselect to customize the header in this template.



Draft Preview

While still in Edit Mode, see a draft preview by clicking the **'Preview'** button at the top of the template.

The preview modal will show all changes.

If enabled, switch between different language views by selecting the desired language radio button.

Send a test email by clicking **'Send as Test'**.

Select **'Close'** when done.

The screenshot shows a 'Draft Preview' modal window. On the left, there is a 'Filter Preview' sidebar with sections for 'Language' (English selected, French unselected), 'Mode' (Freight selected, Parcel unselected), and 'Carrier' (ABF - All selected). At the top right of the modal, there are 'Send as Test' and 'Close' buttons. A blue banner at the top of the preview area reads 'Unpublished changes will not display here. Please publish your alerts to preview.' The preview content is divided into three sections: 'SMS' (a text message with a tracking link), 'HTML Email' (a rich email template with a 'View Details' button), and 'Text Email' (a plain text email version). At the bottom of the filter sidebar, there is an 'Apply' button circled in green. A green line connects the 'Apply' button to the text 'Apply filter changes.' below the modal.

For additional questions, please contact your account Convey representative.