

Touch Points Guide

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Overview

Touch Points capture interactions that businesses and individuals have with your company and brand. These can be both digital Touch Points (via your website, e-mail or social media channels) and non-digital Touch Points (e.g account management calls and meetings).

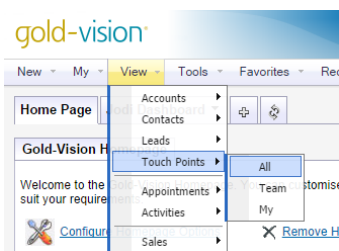
There are 4 different types of Touch Point:

- **Web** (data captured through integration with web tracking tools – Gold-Vision integrates with either *OnMonitoring* or *Lead Forensics*)
- **E-mail** (data captured through Gold-Vision Connect)
- **Social** (data captured through integration with Twitter and Facebook)
- **Manual** (data captured through Gold-Vision outcomes, such as a telephone call or note)

Gold-Vision can be configured to score these Touch Points in accordance to their importance to your business, identifying hot prospects automatically. These scores are imported when the Touch Points are configured so a Lead scoring plan must be in place before this.

The Touch Point area in Gold-Vision allows you to view, filter and report on these Touch Points in order to gain valuable business insight.

You can view Touch Points by going to **View > Touch Points > All Touch Points**



Touch Point Overview Screen

This screen will be blank if you have not yet configured your Touch Points within the Administration Console.

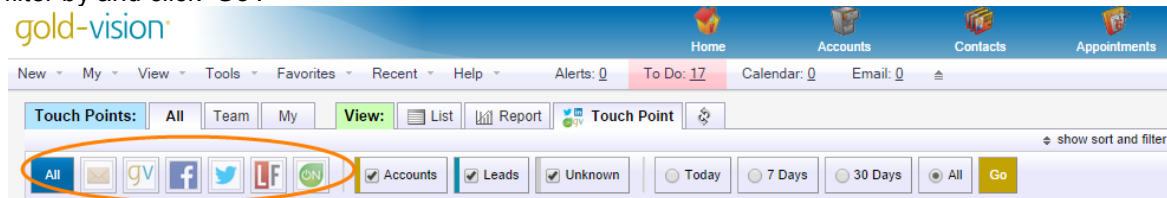
 A screenshot of the Gold-Vision Touch Point Overview screen. The interface shows a list of touch points with columns for account name, source, time, and score. The table is filtered to show 'All' touch points.

Account	Source	Time	Score
NSC2014 National Sales Conference and ...	Search Matched - Tweet matched search term "#salesexpo" - Visit the Exhibition only for FREE. Register her...	28 mins ago	10
NSC2014 National Sales Conference and ...	Search Matched - Tweet matched search term "#salesexpo" - Forget about the business outlook, be on the outlook for business. - Paul J. Meyer #sales #salesexpo	28 mins ago	10
Access Limited Andrada Habean Hot Prospect	Opened a mail - CRM for Sales	29 mins ago	10
Sencon(UK)Ltd	Site Visit - GoldVisionCRM-UKBasedCRMSoftware	3 hours ago	20
Sencon(UK)Ltd	Site Visit - GoldVisionCRM-UKBasedCRMSoftware	3 hours ago	20
Coventry Works #CoventryWorks A friendly, no h...	Search Matched - Tweet matched search term "#salesexpo" - RT @SalesExpo. Enhance your chances of re...	3 hours ago	10
All Fleet Services Limited	Site Visit - Gold Vision CRM - UK Based CRM Software	3 hours ago	10
Gold-Vision CRM (Select Contact) Customer	Site Visit - GoldVisionCRM-UKBasedCRMSoftware	3 hours ago	20
Andrew Test Prospect	Site Visit - GoldVisionCRM-UKBasedCRMSoftware	3 hours ago	20

➤ Using Touch Points

➤ Viewing Touch Points

The Touch Point screen can be filtered by Touch Point source. Click on the icon for types you wish to filter by and click 'Go'.



You can also filter Touch Points by 'Accounts', 'Leads' and 'Unknown' and also by time – 'Today', '7 days' and '30 days'.

When a Touch Point is imported Gold-Vision will see if the data matches any Account, Lead or Contact records. If it does Gold-Vision will automatically assign that Touch Point to the relevant record. The Account/ Lead name will be showing in blue, along with the Contact name if that has also been identified.

	1st Call Transport Service Andrew Fiendleyson <i>Customer</i>		Opened a mail - New Product Offers New Product Offers
	Sotham Engineering Services Ltd A Betts		Opened a mail - test 2 test 2

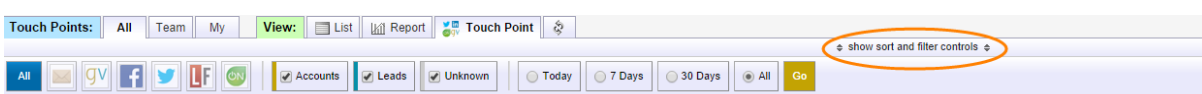
If Gold-Vision can't match the Touch Point against a Lead, Contact or Account record then the Touch Point will be red. By clicking on an unlinked Touch Point name you have the options to manually link it to a record or create a new record.



Clicking the arrow shows the details of the site visit.

Site Visit	GoldVisionCRM-UKBasedCRMSoftware	http://www.qold-vision.com/?qclid=C12UhuDHRMECFQQcwwodtQsAQQ	Duration - 9
Site Visit	GoldVisionCRM-Demo	http://www.qold-vision.com/demo	Duration - 421
Site Visit	GoldVisionCRM-News&Media-Gold-VisiontoExhibitatTheNational...	http://www.qold-vision.com/news-and-media/gold-vision-to-exhibit-at-the-national-sales-conference	Duration - 11
Site Visit	GoldVisionCRM-Pricing	http://www.qold-vision.com/pricing	Duration - 14
Site Visit	GoldVisionCRM-Demo	http://www.qold-vision.com/demo	Duration - 0

You can filter Touch Points further by clicking on the 'show sort and filter controls'



You can filter by:

- Touch Point Source – e.g Connect, Facebook
- Action – e.g 'Re-tweeted', 'Opened a Mail'
- Company Name
- Contact Name
- Summary
- Details
- Category – these are predefined in the Administration Console
- Score
- Source – referring website
- Industry
- Account Type – E.g Re-seller, Prospect, Account.
- Item Type
- Created Date

➤ Touch Point Actions

Touch Point Actions differ depending on the Touch Point Source. The action is shown on the Touch Point record.

	1St Call Transport Service Andrew Fiendleyson	Customer	-	Opened a mail - New Product Offers 
				New Product Offers

Gold-Vision Connect

- Opened a Mail
- Clicked a Link
- Forwarded a Mail
- Replied to a Mail

Gold-Vision Touch Points

- Touch Points can be manually added when adding a note in Gold-Vision or Lead Management

Lead Forensics/ On-Monitoring

- Website Visit
- Single Page/ Bounce

Facebook

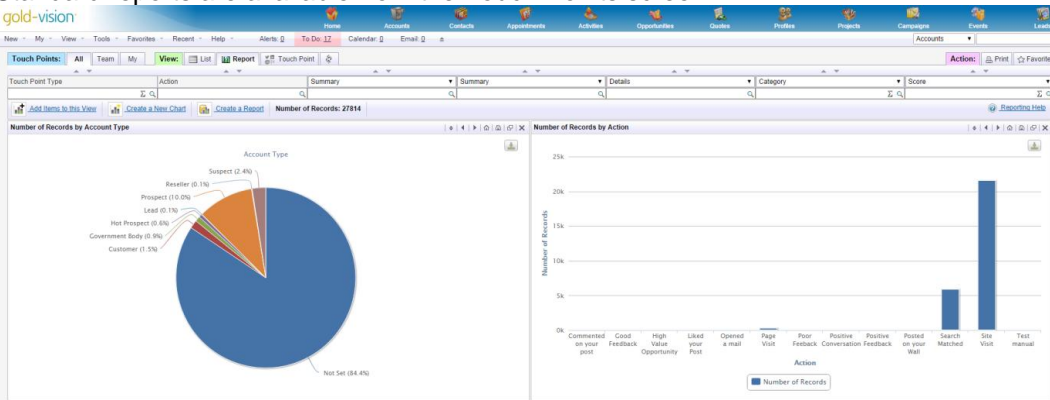
- Posted on Your Wall
- Liked Your Post
- Commented on Your Post

Twitter

- Replied to our Tweet
- Followed Us
- Re-Tweeted our Tweet
- Mentioned us in a Tweet
- Search all Tweet

➤ **Reporting**

Standard reports are available from the Touch Points screen.



➤ **Categories**

You can define your own Touch Point categories and these can be configured within the Administration Console (see Touch Point Set-Up).

	Facebook Mark Vernon	13 days ago 02/10/2014 11:04	0
	Facebook Mark Vernon	13 days ago 02/10/2014 11:04	0

You can associate a colour to each category and this colour will be displayed on the right hand side of the screen.

➤ **Scoring**

The score for the associated Touch Point will also be displayed on the right hand side of the screen. This is not the total score for the Account/Contact/Lead but just the score that has been assigned to the record because of this particular Touch Point. We will explain setting up Touch Point scores later on.

Touch Point Scores in Account, Contact and Lead Records

Accounts, Contacts and Leads will all build up a Touch Point score within their records. This will be an accumulation of all of the Touch Points related to a particular record.

Account Touch Points

You can view the Account Touch Point score, Last Touch Point date and Highest Score ever from the Account record. This will only be displayed if the Account has registered Touch Points.

The screenshot shows an account record for 'Boutique Design Ltd'. The 'Overview' section displays the following information:

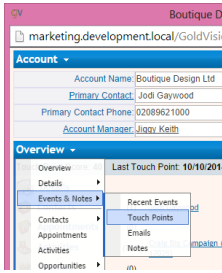
- Touch Point Score: 40
- Last Touch Point: 10/10/2014 11:52
- Highest Score Ever: 200

Below this, there is a list of account details and a 'Recent Events' table:

Recent Events	Action	User	Date/Time
Boutique Design Ltd	Account accessed	Jodi Gaywood	15/10/2014 16:02:05
Jodi Gaywood	Contact updated	Nikki Bugla 2	14/10/2014 09:22:28
Jodi Gaywood	Contact accessed	Nikki Bugla 2	14/10/2014 09:22:25
Telesales (11/09/2014-2)	Activity accessed	Jiggy Keith2	08/10/2014 11:52:27

You can view all of the Touch Points associated with an account by clicking on the Touch Point Score and also by going to:

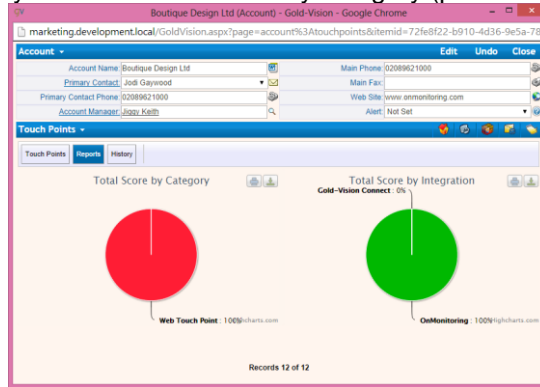
Overview > Events & Notes > Touch Points



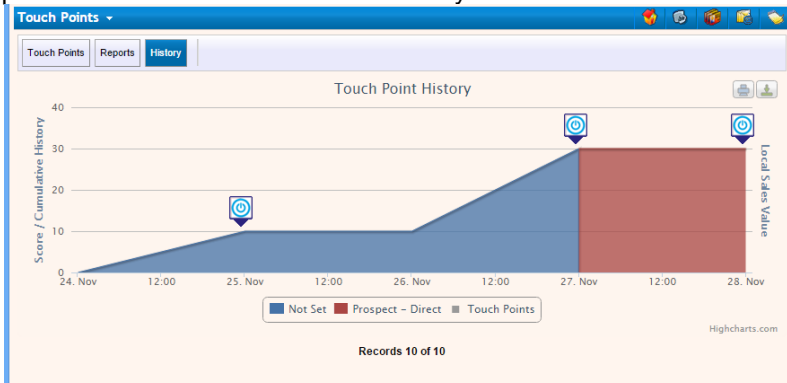
Touch Points - This screen will show you all associated Touch Points:

Touch Points	Reports	History
Site Visit - www.gold-vision.com/learn		10
Site Visit - www.gold-vision.com/pricing		10
Site Visit - www.gold-vision.com/terms		10
Site Visit - www.gold-vision.com/pricing		10
Site Visit - www.gold-vision.com/gold-vision.com		0
Site Visit - www.gold-vision.com/contact-us		0
Site Visit - www.gold-vision.com/contact-us		0
Site Visit - www.gold-vision.com/gold-vision.com		0
Site Visit - www.gold-vision.com/gold-vision.com		0
Site Visit - www.gold-vision.com/contact-us		0
Site Visit - www.gold-vision.com/terms		0
Site Visit - www.gold-vision.com/terms		0
Opened a mail - [mailto:info@gold-vision.com]	Gold Vision Contact	0
Opened a mail - [mailto:info@gold-vision.com]	Gold Vision Contact	0

Reports- This screen shows you Touch Point score by category (pre-defined) and type:



History - This graph shows the Touch Point score history:



The chart goes from blue, which the record was a lead, to red when they became a prospect.

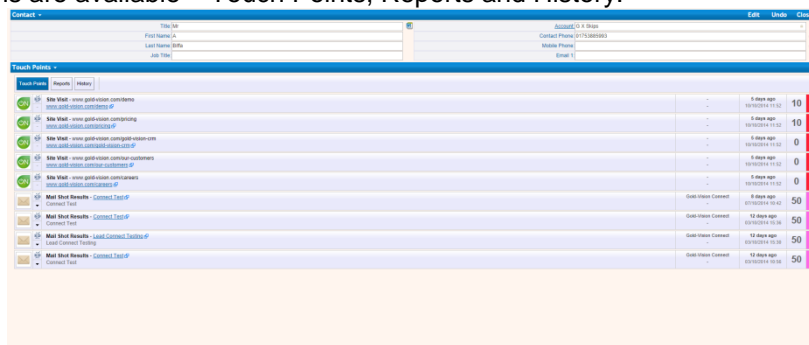
Contact Touch Points

From the contact record click on ‘Business’ and then ‘Touch Points’:



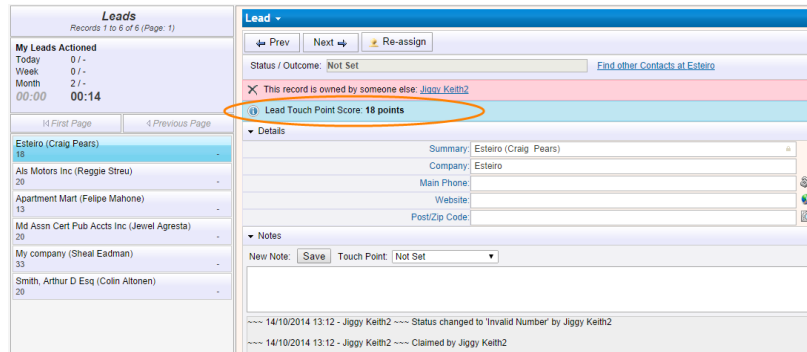
From here you will see the Touch Points associated with the contact record.

The same options are available – Touch Points, Reports and History.

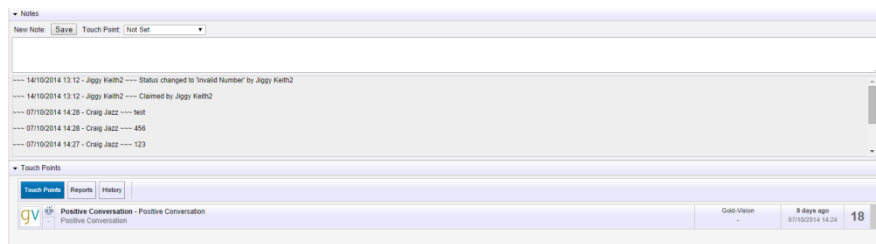


Lead Touch Points

Touch Point scores will show within the Lead record. If the Touch Point score is 0 then the blue bar will not be visible.

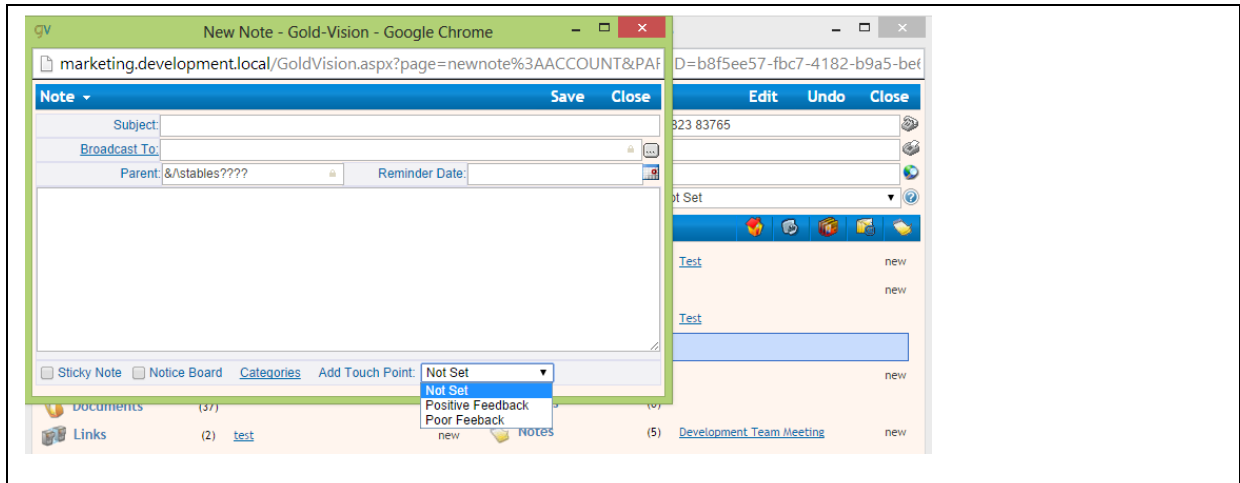


The associated Touch Points will be available at the bottom of the Lead record:



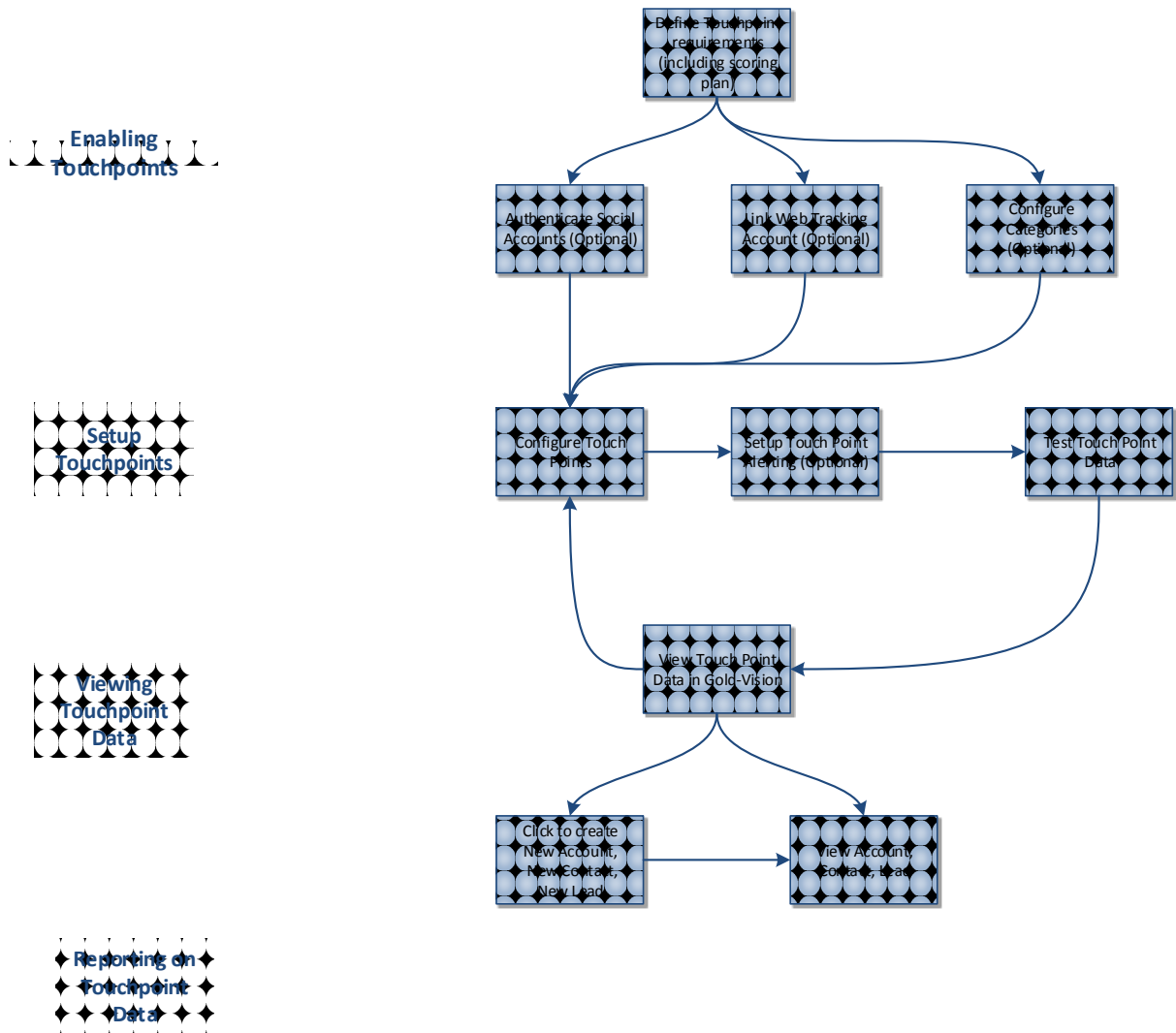
Manual/Gold-Vision Touch Points

Touch Points can be added when adding a Note in Gold-Vision or Lead Management



> Setting Up Touch Points

➤ Touch Point Set-Up Overview



Touch Points must be configured within the Administration Console in order for data to be imported from the different sources. **Please note the Data Transfer Service needs to be running for the Touch Points to be imported.**

➤ **Configuring Categories**

You can configure Touch Point categories to identify different types of Touch Points in the list view and in the Account/Contact Touch Pint reporting view. These are optional so you can skip this step if you do not require them.

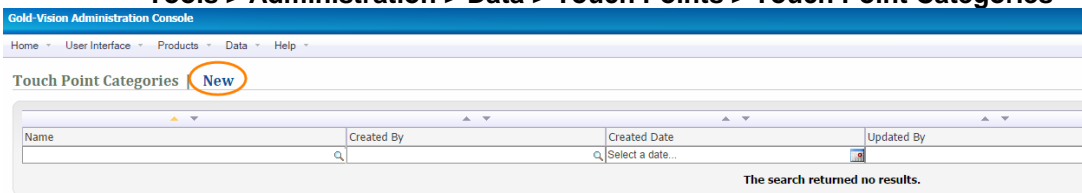
Your Touch Point categories could relate to the type of Touch Point you are tracking, for example:

- Web
- Social
- E-mail
- Non-digital

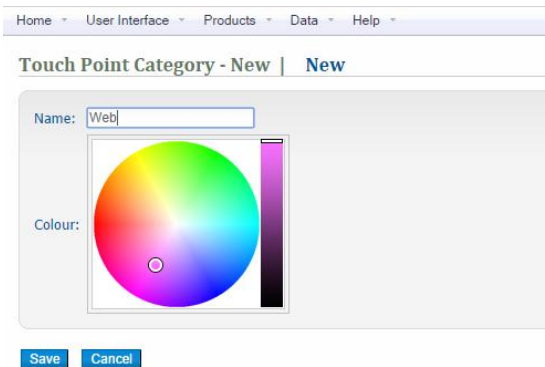
You can assign a colour to each Touch Point category so that they are easy to identify in the User Interface.

To configure your categories go to:

Tools > Administration > Data > Touch Points > Touch Point Categories



Once you are at this screen click 'New' to create a new Touch Point category. Name the category and choose an associated colour.



➤ You will then see the category appear under the Touch Point categories screen:

Touch Point Categories | New

Name	Created By	Created Date	Updated By	Updated Date	Colour	
E-mail	ESTEIRO\jigaywood	03/10/2014 10:16:11	ESTEIRO\nkbugla	01/12/2014 11:48:10		✗
Non-Digital	ESTEIRO\jigaywood	21/10/2014 11:22:07	ESTEIRO\nkbugla	01/12/2014 11:48:49		✗
Social Touch Point	ESTEIRO\nkbugla	25/09/2014 10:41:35	-	-		✗
Web Touch Point	ESTEIRO\nkbugla	25/09/2014 10:41:10	-	-		✗

➤ **Social Authentication**

In order to track social Touch Points you must first authenticate your social accounts. You will need to be the Administrator for your Company twitter Account or Facebook Page. You also need to authenticate any social accounts that you wish to send social campaigns from. There are two ways to do this – within the Administration Console and on the Preferences Tab.

Administration Console

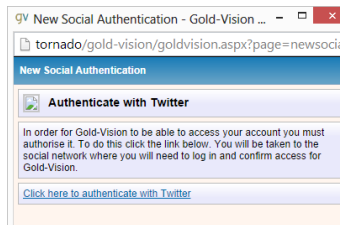
Tools > Administration > Data > Touch Points > Social Authentication

Here you can see authenticated social accounts for all users.

Profile Name	Network / Type	User	Created Date	Updated Date	Expiry Date	Profile Url	Bounced/Disabled
Gold-Vision CRM	Twitter	Jodi Gaywood	15/10/2014 09:39:01			http://www.twitter.com...	

Records 1 to 1 of 1

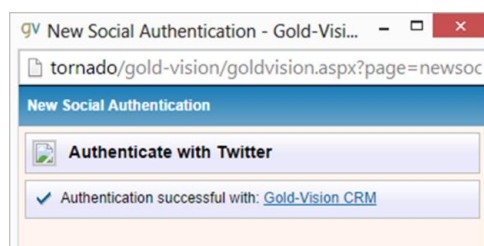
To authenticate a social account click on the 'New' icon. This will bring up the option to authenticate either a Twitter account or a Facebook account. Choose the option you require. For example authenticating the Gold-Vision Twitter account.



Before you click on the 'Click here to authenticate with' link, log in to your social media account via your browser. Once you click on the link you will be routed to an authentication page where you need to click 'Authorize app'.



You will then be directed to a screen to confirm whether the authentication has been successful.

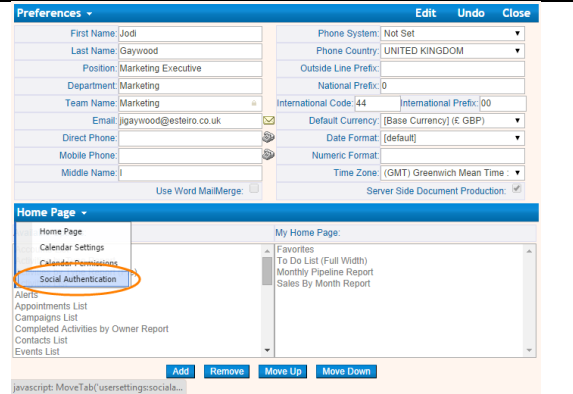


Preferences Tab

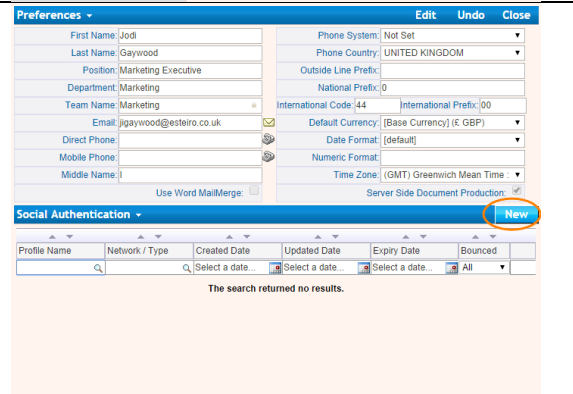


To do this click on your name at the bottom left hand side of the screen:

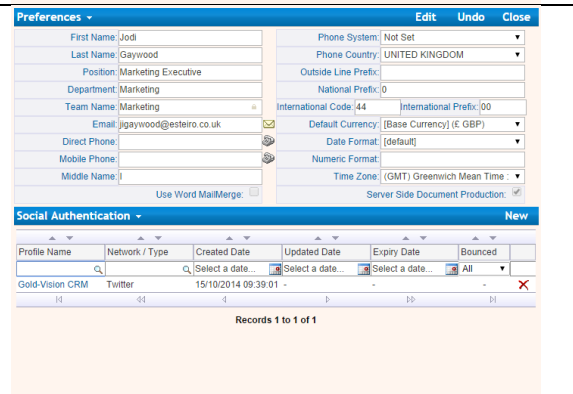
Then click on 'Home Page' > 'Social Authentication'



Then click 'New'



This will bring up the option to authenticate either a Twitter account or a Facebook account. Choose the option you require and follow the same steps as above. The authenticated account will then be available to view in the Preferences tab



You can authenticate as many social accounts as required and you are able to delete these by clicking on the cross on the right-hand side. If you want to track the interactions that happen on your Facebook business page you must authenticate the account associated with the page. Only information from the Facebook business pages will be tracked through Gold-Vision Touch Points. N.B – Accounts are authenticated on a per user basis – User A would not be able to broadcast social messages using an account User B has authenticated. Each user has to authenticate the social account in order to broadcast messages.

➤ Linking your Web Tracking Account

To track your website visits you must first create an account with either Lead Forensics or OnMonitoring. Please contact your Account Manager for advice on this. Once you have an account set up it can be linked with Gold-Vision.

Please ensure that before you configure any Touch Points that you are receiving data into your Lead Forensics or OnMonitoring portal.

➤ Configuring Touch Points

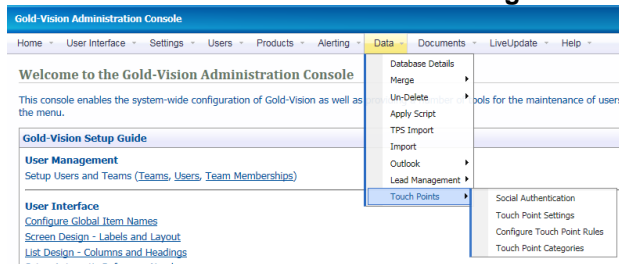
➤ Introduction

In order to begin importing Touch Points from the different sources into Gold-Vision you must firstly configure them within the Administration Console.

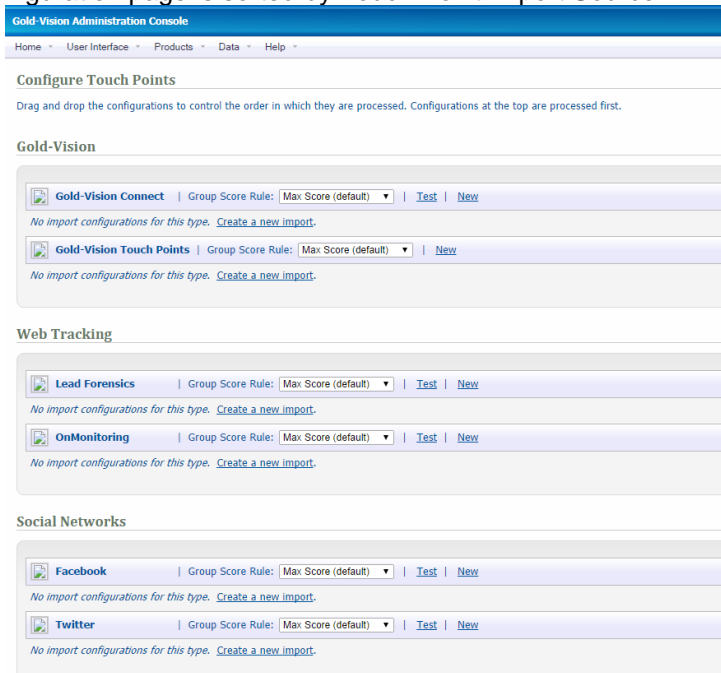
N.B Before you configure your Touch Points you should have the following in place:

- A Touch Point scoring plan – see **separate document**
- If you plan to track website visits you need a linked OnMonitoring or Lead Forensics account
- If you plan to track your social activity you need to authenticate your Company Twitter and/or Facebook accounts
- If you plan to track your e-mail marketing you need a Gold-Vision Connect account and need to be using New mode Campaigns
- If you wish to use Touch Point categories these must be configured

Tools > Administration > Data > Touch Points > Configure Touch Point Rules



The Touch Point configuration page is sorted by Touch Point Import Source:



➤ Touch Point Configuration Examples

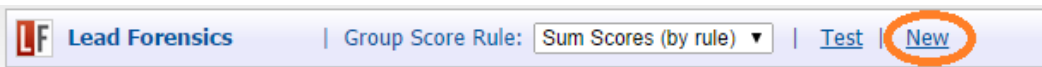
This example shows you how to configure your Touch Points. The Touch Point Import Type in this example is **Web Tracking**. Other Touch Point Import Types are configured slightly differently and these are explained later. **Please see Tips below**

Here is an example Touch Point scoring plan:

1. If a company goes on my pricing page give them a score of 20 and automatically create a Lead if they are unknown
2. If a company goes on my demo page give them a score of 20 and automatically create a Lead if they are unknown
3. If a company goes on my product page give them a score of 10
4. If a company goes on any other page I want to track the visit but not assign a score

Each of the four points above requires a separate Touch Point rule configured underneath the Web Tracking Import Source (either Lead Forensics or OnMonitoring depending on which account the customer has set up). In this example we will use Lead Forensics.

To set up a Touch Point rule you need to click on the new icon next to the Import Source:



This will bring up the following screen:

 A screenshot of the 'Touch Point Config - New (Lead Forensics)' form. The form is titled 'Gold-Vision Administration Console' and has a navigation menu with items like Home, User Interface, Settings, Users, Products, Alerting, Data, Documents, LiveUpdate, and Help. The form itself has a 'Details' section with fields for 'Name' (Pricing Page), 'Category' (Web Touch Point), and 'Active' (Yes/No). Below that is an 'Action Types' section with checkboxes for 'Web Site Visit' and 'Single Page / Bounce'. The 'Filters' section has a 'Url' field containing 'www.gold-vision.com/pricing'.

You then need to fill out this form for the Touch Point rule. For example :

Name – Pricing Page

Category – Web Touch Point

Action – You can choose more than one action here – ‘Web Site Visit’ will capture website visits of one or more pages. ‘Single Page / Bounce’ will capture website visits of only one page. It is likely that you choose either ‘web visit’ or both action types. Single page/bounces only track 1 page website visits so you may want to exclude these.

Filters – Here you type in the URL of the page(s) that you would like to track. You can add multiple URLs or use the * button for wildcards. For example, *pricing, would track all visits to any URL with ‘pricing’ in it. You also need to fill out the duration of the page visit. For example, if you only wanted to track visits to a page of more than 15 seconds you would enter ‘>0.25’. This can be left blank if you want to track all visits to the page, irrelevant of how long they spend on the page. In the above example no page times were specified so this will stay blank.

Scoring
 You can apply a score to any data imported using this definition plus an ageing setting that will cause the score to degrade over time.

Initial Score:
 Degrade Score: every
 Zero Score:

Linking
 Select which fields will be used to link touch point data to records.

Contacts:
 Contact Phone
 Email 1
 Email 2
 Email 3

Accounts:
 Account and Address - Account name and similar address.
 Account Name
 Main Phone
 Web Site
 Email Domains

Leads:
 Company and Address - Company name and similar address.
 Company
 Website
 Email
 Contact Phone
 Main Phone

Lead Import
 Select whether to create new leads from incoming data. Please note new leads will only be imported if no matching records are identified by the linking options above.

Import Leads:
 Import To:

Scoring – Here you enter the score for the Touch Point rule. In the example above the score is 20. Touch Point scores can be degraded, so that they gradually move down to zero. You can choose how to degrade the score. For example, you might want an initial score of 50 but you want this score to degrade by 10 every 7 days. You can also choose to set the score to zero after a certain period of time. For example, you might want an initial score of 100 but you want this to revert back to zero after 30 days.

There may be instances where you want to assign a negative score – this is possible by inputting a negative figure.

Linking – When a Touch Point is imported Gold-Vision will try to match the data against Contacts, Accounts and Leads. Here you can choose which fields to match against. It is recommended that you keep all of these ticked.

Lead Import – You can automatically create Leads from Touch Points. To do this you must tick the Lead Import box. If the Touch Point is not matched to a Gold-Vision record then it will automatically create a Lead in a list of your choice. In this example we want to create a Lead so this box is ticked. Once you have filled out the form click 'save' and you will be routed back to the Touch Point configuration page. Here you will see the new rule sitting under the Import Source (Lead Forensics in this example).

Lead Import
 Select whether to create new leads from incoming data.

Import Leads:
 Import To:

Web Tracking

Group Score Rule:	Sum Scores (by rule)	Test	New
Lead Forensics	20 points	Active	Created by ESTEIRO\jigaywood on 20/10/2014 14:41:16

Repeat the process of setting up your Touch Point rules until all of them are showing under the Import Source.

Web Tracking

Lead Forensics Group Score Rule: Sum Scores (by rule) Test New						
≡ Pricing Page	Web Touch Point	20 points	Active	Created by ESTEIRO\jigaywood on 20/10/2014 14:41:16	Imports Leads to: Craig Lead	
≡ Demo Page	Web Touch Point	20 points	Active	Created by ESTEIRO\jigaywood on 20/10/2014 14:47:23	Imports Leads to: Andrew Te	
≡ Product Pages	Web Touch Point	10 points	Active	Created by ESTEIRO\jigaywood on 20/10/2014 14:47:59	Imports Leads to: Andrew Te	
≡ Other Pages	Web Touch Point	0 points	Active	Created by ESTEIRO\jigaywood on 20/10/2014 14:53:34		

The fourth rule needs to be configured slightly differently:

“If a company goes on any other page I want to track the visit but not assign a score”

The Touch Point rules not only define the Touch Point score – they also enable the import – so you do need to set up a generic rule if you want to capture all website visits. Do not specify a URL and keep the Touch Point score at zero.

➤ Touch Point Rule Hierarchy

As above, it is likely that you will set-up multiple rules for each Touch Point Source. It is important to understand that Touch Point imports are performed in the order they are visible on this page. In order to change the order of which they are run you can drag and drop the rows that appear under the Touch Point Sources.

Each Touch Point will try and match a Touch Point rule, starting at the top of the funnel. Once the Touch Point has matched a rule it will be assigned the relevant score. We suggest that the import rules are ordered in most specific filters first to most generic last.

Touch Point Import Types work slightly differently:

- **Connect & Social** – Each action starts at the top of the funnel (e.g re-tweeted, clicked a link)
- **Web Tracking** – Each page visited starts at the top of the funnel
- **Gold-Vision** – These don't work in the funnel way as they are 1 to 1 relationships. You can drag and drop the rules to change the order they appear in on the screen.

➤ Touch Point Rule Funnel

This image illustrates how the Touch Points are imported. Each action/page visit starts at the top of the funnel and Gold-Vision sees whether it matches the conditions of the first rule. It will carry on down the funnel until it matches a rule. It is then assigned the score that is associated with that rule.



The only Touch Point Import Type that this doesn't work with is Gold-Vision Touch Points. They work on a 1 to 1 basis. You can re-order these in the Administration Console and this is reflected in how they are displayed in the user interface

➤ Group Score Rules

The group score rule is available for Connect Touch Points and Web Tracking Touch Points.

Configure Touch Point Rules

Drag and drop the configurations to control the order in which they are processed. Configurations at the top are processed first.

Gold-Vision

Gold-Vision Connect		Group Score Rule	Max Score (default)	Test Rules	New Rule	
☰	Prospect E-mail - Clicked on Pricing Link	E-m	Min Score	20 points	Active	Last modified by Jodi Gaywood on 12/11/2014
☰	Prospect E-mail - Clicked a Link	E-m	Sum Scores (all)	10 points	Active	Last modified by Jodi Gaywood on 12/11/2014
☰	Prospect E-mail - Forwarded a mail	E-mail	Sum Scores (by rule)	5 points	Active	Last modified by Jodi Gaywood on 12/11/2014
			Average Score			

These define how the 'session' score is calculated. For Connect this relates to the sequence of interactions a contact has with an e-mail (Opened, Clicked a Link etc). For web tracking this relates to a website visit. The group score rule sums the rules in different ways.

The options available are:

- Max Score (default)
- Min Score
- Sum Scores (all)
- Sum Scores (by rule)
- Average Score

Using the **Web Tracking example** (see rules configured below), the session score will be different depending on which of the group score rules you chose.

For example, if a company visited the website and went to the following pages a score would be associated to each page:

- Home Page - 0
- Demo - 20
- Product Page 1 - 10
- Contact Us - 0
- Pricing - 20
- Product Page 2 - 10

The session score would be calculated as follows:

- Max Score (default) - 20
- Min Score - 0
- Sum Scores (all) - 60
- Sum Scores (by rule) - 50
- Average Score – 10

Connect Example:

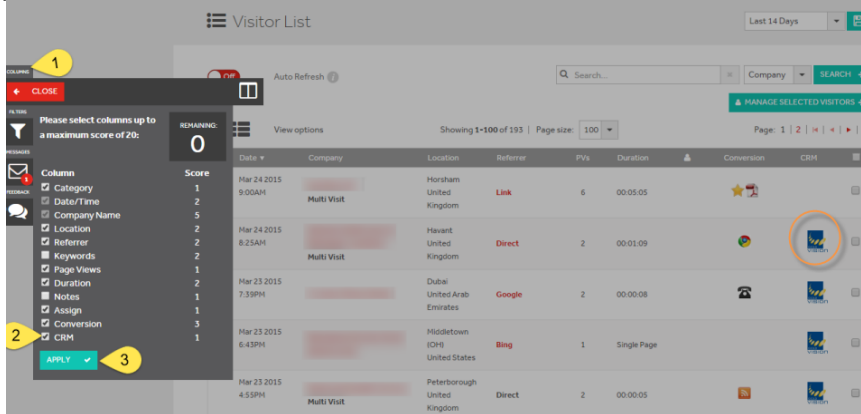
- Opened – 10
- Clicked a Link – 20
- Forwarded – 20
- Replied – 30

If a contact did all 4 of the actions above in one session (clicking on 2 links) then the score would be calculated differently depending on which of the options are selected below.

- Max Score (default) - 30
- Min Score - 10
- Sum Scores (all) - 100
- Sum Scores (by rule) - 80
- Average Score – 25

➤ **Tips**

- Check that you are receiving data from Lead Forensics/On Monitoring – this can be done by logging on to your portal
- Check that the data is being sent to Gold-Vision. This is indicated by the Gold-Vision Logo in your Portal. You might need to add the logo to your view:



- Check that the Data Transfer Service is running
- Firstly create a 'Catch All' rule, leaving the URL blank – this will help to ensure that everything is working
- Use the 'Test Rules' and check in your Gold-Vision that the test has worked ok. To do this you need to click on 'Test'.

Web Tracking

LF	Lead Forensics	Group Score Rule:	Sum Scores (by rule)	Test	New
	Pricing Page	Web Touch Point	20 points	Active	
	Demo Page	Web Touch Point	20 points	Active	
	Product Pages	Web Touch Point	10 points	Active	
	Other Pages	Web Touch Point	0 points	Active	

Here you will see this page where you can fill out dummy Touch Point data. You will then see the Touch Point in the User Interface.

Test Touch Point (Lead Forensics)

Touch Point Data

Action:

Url:

Duration (Minutes):

CompanyName:

Phone1:

Website:

Domain:

Address1:

Address2:

Address3:

Town:

County:

PostCode:

Country:

ContactEmail:

ContactEmail:

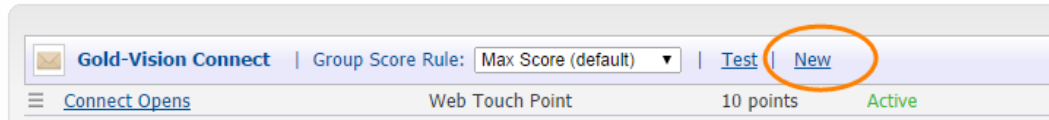
Please contact support@gold-vision.com if Touch Points are not appearing in your Gold-Vision.

➤ Gold-Vision Connect Configuration

Please note you will need to use New Mode Campaigns in order to use Connect Touch Points.

To create a new Touch Point rule click 'New' next to Gold-Vision Connect.

Gold-Vision



The screenshot shows the Gold-Vision Administration Console. The main content area is titled 'Touch Point Config - New (Gold-Vision Connect)'. It contains several sections:

- Details:** A form with a 'Name' input field, a 'Category' dropdown menu set to 'Not Set', and an 'Active' radio button group with 'Yes' selected. Below the radio buttons is the text: 'Import and scoring will only occur when the configuration is active.'
- Action Types:** A section with the text 'Import the following actions. If no options are selected then no data will be imported.' and four checkboxes: 'Clicked a link', 'Forwarded a mail', 'Replied to a mail', and 'Opened a mail'.
- Filters:** A section with the text 'Using the fields below, select how you would like to filter the incoming data. All filter conditions must be met to pass. For multiple line or comma separated filters only one match is required per filter field.' It includes a 'Mail Shot Type' dropdown menu with options: 'Prospect E-mail', 'Newsletter', 'Telemarketing', and 'Press Release'. Below this is a note: 'CTRL + click to select multiple items. Select no items to not filter on this field.' and a 'Uri (Clicks Only):' input field with a note: 'Enter one per line. Use * as a wildcard.'

Example Connect Touch Point:

"I want to give anyone who opens a prospect e-mail a score of 10, degrading by 1 every 24 hours"

Details

- Enter the name of the Touch Point rule – **'Prospect E-mail Open'**
- Enter the Touch Point category – **'E-mail'**
- Choose 'Active' to ensure that the rule is active

Touch Point Config - New (Gold-Vision Connect)

The screenshot shows the Gold-Vision Administration Console with the 'Touch Point Config - New (Gold-Vision Connect)' form. The 'Details' section is filled with the example configuration:

- Name:** Prospect E-mail Open
- Category:** E-mail
- Active:** Yes (selected)

 Below the 'Active' radio buttons is the text: 'Import and scoring will only occur when the configuration is active.'

Action Types

Tick the box of the Action Type that you would like to track. For Connect you can choose between:

- Clicked a link
- Forwarded a mail
- Replied to a mail
- Opened a mail

The example is 'Opened a mail' so this is ticked.

Action Types

Import the following actions. If no options are selected then no data will be imported.

Actions: Clicked a link Forwarded a mail Replied to a mail Opened a mail

Filters

Optional fields, but all filter conditions must be met in order for the Touch Point to be imported.

- Choose mailshot type (this is configured in the Administration Console) - **Prospect E-mail**
- If you would like to track a specific link within Connect then enter this in the URL box. **The example is not tracking a specific link so this can remain blank**

Scoring

You can enter a score for the Touch Point import rule. This score can be set to degrade over time. If you do not want to give the Touch Point rule a score then you can simply leave this at zero. This will mean that the data will be imported but no score will be assigned to it.

The score for this example is 10, degrading by 1 every 24 hours

Scoring

You can apply a score to any data imported using this definition plus an ageing setting that will cause the score to degrade over time.

Initial Score:	<input type="text" value="10"/>
Degrade Score:	<input type="text" value="1"/> every <input type="text" value="24 hours"/>
Zero Score:	<input type="text" value="(Automatically - As defined above)"/>

Linking

When a Touch Point is imported Gold-Vision will try to match this against the existing Account, Contact and Lead records. This area allows you to choose which fields will be used to link Touch Point data to these records. It is advisable to keep all of these boxes checked in order to get as many Touch Points linked to records as possible.

Linking

Select which fields will be used to link touch point data to records.

Contacts:	
<input checked="" type="checkbox"/>	Unique ID
Leads:	
<input checked="" type="checkbox"/>	Unique ID

Once you have filled out the data for the Touch Point rule click Save, you will then be directed back to the main Touch Point configuration screen and you will see the new rule sitting under the Touch Point Source.

Gold-Vision Connect		Group Score Rule: Max Score (default)	Test	New
<input checked="" type="checkbox"/>	Connect Clicks	Social Touch Point	10 points	Active
<input checked="" type="checkbox"/>	Connect Opens	Web Touch Point	10 points	Active


It is likely that you will want to set-up multiple rules for Connect. These will all be listed on the Touch Point configuration screen in the Administration Console.

Group Score Rule – Each Connect session score will be calculated using the rule you choose. See Group Scoring for more information on this.

➤ Gold-Vision Touch Points

Gold-Vision Touch Points can be set up to manually give a score, for example you might wish to assign a Touch Point after a positive conversation with a Lead or a Contact. Set up the Touch Point as below then when adding a note there is the option to add a Touch Point. They can also be set up to be used in Alerting (see below)

Touch Point Config - New (Gold-Vision Touch Points)



Details
Enter a name to identify this import definition and select an optional category.

Name:

Category:

Active: Yes No
Import and scoring will only occur when the configuration is active.

Action Types
Import the following actions. If no options are selected then no data will be imported.

Actions: Manual Alerting

Scoring
You can apply a score to any data imported using this definition plus an ageing setting that will cause the score to degrade over time.

Initial Score:

Degrade Score: every

Zero Score:

Details

- Enter the name of the Touch Point rule
- Enter the Touch Point category (see **Touch Point Categories**)
- Choose 'Active' to ensure that the rule is active

Action Types

Enter the Action Type that you would like to track. For Gold-Vision you can choose between:

- Manual – the Touch Point is available when adding a note in Gold-Vision or Lead Management
- Alerting – the Touch Point is available in Alerting

Scoring


You need to enter a score for the Touch Point import rule. This score can be set to degrade over time. If you do not want to give the Touch Point rule a score then you can simply leave this at zero. This will mean that the data will be imported but no score will be assigned to it.

➤ Social Touch Points – Facebook

Gold-Vision Administration Console

Home ▾ User Interface ▾ Settings ▾ Users ▾ Products ▾ Alerting ▾ Data ▾ Documents ▾ LiveUpdate

Touch Point Rule - New (Facebook)



Details
Enter a name to identify this rule and select an optional category.

Name:

Category:

Active: Yes No
Import and scoring will only occur when the configuration is active.

Action Types
Import the following actions. If no options are selected then no data will be imported.

Actions: Posted on your Page Wall Liked your Page Post Commented on your Page Post

Social Accounts
Select the social accounts to use for this configuration.

Details

- Enter the name of the Touch Point rule
- Enter the Touch Point category (see **Touch Point Categories**)
- Choose 'Active' to ensure that the rule is active

Action Type

Enter the Action Type that you would like to track. For Facebook you can choose between:

- Posted on your Wall
- Liked your Post
- Commented on your Post

Social Accounts

Choose which social accounts you would like to pull data in from. All authenticated Facebook accounts will be showing here. If you haven't authenticated a Facebook account please go to **Social Authentication**.

Social Accounts

Select the social accounts to use for this configuration.

- Use All Available
-
- Mark Vernon Goldie Smith

Name

Scoring

You need to enter a score for the Touch Point import rule. This score can be set to degrade over time. If you do not want to give the Touch Point rule a score then you can simply leave this at zero. This will mean that the data will be imported but no score will be assigned to it.

Linking

When a Touch Point is imported Gold-Vision will try to match this against the existing Contact and Lead records.

Linking

Select which fields will be used to link touch point data to records.

- Contacts:**
- Facebook Identity
-
- Accounts:**
- Facebook Identity
-
- Leads:**
- Facebook Identity

➤ Social Touch Point – Twitter

Gold-Vision Administration Console

Home - User Interface - Settings - Users - Products - Alerting - Data - Documents - LiveUpdate - Help -

Touch Point Rule - New (Twitter)

**Details**

Enter a name to identify this rule and select an optional category.

Name:

Category:

Active: Yes No

Import and scoring will only occur when the configuration is active.

Action Types

Import the following actions. If no options are selected then no data will be imported.

Actions: Replied to our Tweet Followed Us Re-Tweeted our Tweet Mentioned us in a Tweet Search all Tweets

Social Accounts

Select the social accounts to use for this configuration.

Details

- Enter the name of the Touch Point rule
- Enter the Touch Point category (see **Touch Point Categories**)
- Choose 'Active' to ensure that the rule is active

Action Type

Enter the Action Type that you would like to track. For Twitter you can choose between

- Replied to our Tweet
- Followed Us
- Re-Tweeted to our Tweet

- Mentioned us in a Tweet
- Search all Tweets

Social Accounts

Choose which social accounts you would like to pull data in from. All authenticated Facebook accounts will be showing here. If you haven't authenticated a Facebook account please go to **Social Authentication**.

Filters

If you choose 'Search all Tweets' you must enter a search term in the filter. This can be a hashtag or a twitter handle. Warning – if you enter a popular hashtag, such as #crm, you will import a considerable amount of data which is not advisable.

Filters

Using the fields below, select how you would like to filter the incoming data. All filter conditions must be met to pass. For multiple line or comma separated filters only one match is required per filter field.

Search Term: #mvc
Enter a hashtag or twitter handle e.g. #goldvisioncrm or @goldvisioncrm. No wildcards.

Scoring

You need to enter a score for the Touch Point import rule. This score can be set to degrade over time. If you do not want to give the Touch Point rule a score then you can simply leave this at zero. This will mean that the data will be imported but no score will be assigned to it.

Linking

When a Touch Point is imported Gold-Vision will try to match this against the existing Account, Contact and Lead records. This area allows you to choose which fields will be used to link Touch Point data to these records. It is advisable to keep all of these boxes checked in order to get as many Touch Points linked to records as possible.

Linking

Select which fields will be used to link touch point data to records.

Contacts:
 Twitter Identity

Accounts:
 Twitter Identity

Leads:
 Twitter Identity

> Touch Point Rule Configuration Plan

Below is an example of how to set up Touch Point Rules

> Gold-Vision Connect Touch Points

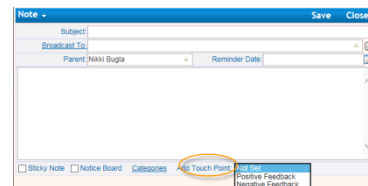
Sum scores total

Name	Category	Action	Mail Shot Type	URL	Score	Degrade Score
Prospect-clicked a link	E-mail	Clicked a link	Prospect E-mail	N/A	10	0 after 21 days
Prospect – clicked a pricing link	E-mail	Clicked a link	Prospect E-mail	www.gold-vision.com/pricing	20	0 after 21 days
Prospect – Forwarded a mail	E-mail	Forwarded a mail	Prospect E-mail	N/A	5	0 after 21 days
Prospect – replied to a mail	E-mail	Replied to a mail	Prospect E-mail	N/A	5	0 after 21 days
Prospect – opened a mail	E-mail	Opened a mail	Prospect E-mail	N/A	5	0 after 21 days

> Gold-Vision Touch Points

Name	Category	Action Type(s)	Score	Degrade Score
Positive Feedback	Verbal	Manual *	20	0 after 21 days
Negative Feedback	Verbal	Manual	-100	No

- IE when creating a note you can also add a Touch Point



> Social Touch Points

Twitter Touch Points

Name	Category	Action Type(s)	Social Accounts	Score	Degrade Score
Twitter	Social	Replied Followed Re-Tweeted Mentioned	Gold-Vision CRM Twitter Account	5	0 after 24 hours

Facebook Touch Points

Name	Category	Action Type(s)	Social Accounts	Score	Degrade Score
Gold-Vision CRM	Social	Posted Liked Commented	GV Facebook	5	0 after 21 days

➤ **Web Tracking Touch Points**

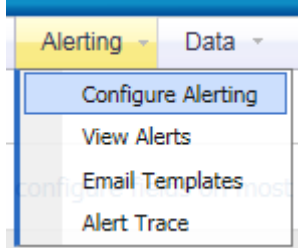
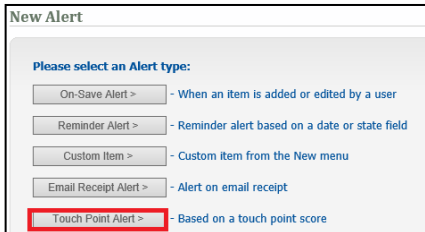
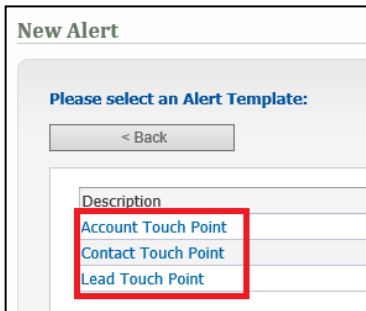
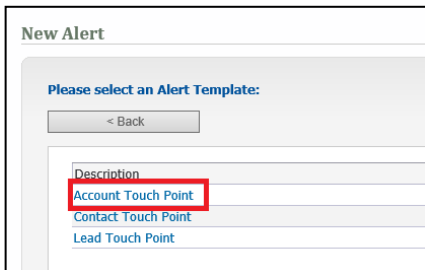
Sum scores total

Page(s)	Category	Score	Degrade Score	Create Lead	Duration
Product Pages *gold-vision-crm	Web	5	0 after 21 days	Yes	More than 10 secs
Demo page http://www.gold-vision.com/demo http://www.gold-vision.com/demo/gold-vision-demo	Web	10	0 after 21 days	Yes	More than 2 secs
Thank you pages *thank-you	Web	10	0 after 21 days	Yes	No
Trial http://www.gold-vision.com/gold-vision-trial	Web	10	0 after 21 days	Yes	More than 2 seconds
Contact Us http://www.gold-vision.com/contact-us	Web	10	0 after 21 days	Yes	More than 2 seconds
Brochure Download Need to create thank you page	Web	10	0 after 21 days	Yes	No
Implementation *implementation	Web	5	0 after 21 days	Yes	More than 10 seconds
Our Customers *our-customers	Web	5	0 after 21 days	Yes	More than 10 seconds
Pricing http://www.gold-vision.com/pricing	Web	20	0 after 21 days	Yes	More than 2 seconds

➤ Touch Point Automation

Please note this is only available with Marketing Automation.

➤ Touch Point Alerts

<p>With the release of Gold-Vision 7.0 a new Alert type is available called Touch Point Alert. This is located in the following location:</p> <p>Select New → Touch Point Alert</p>	
<p>This new alerting type allows users to create an alert based on a Touch Point score.</p>	
<p>There are three different types of Touch Point Alerts that can be setup:</p>	
<ol style="list-style-type: none"> 1) Account Touch Point: allows you to create a Touch Point alert associated to an Account. 2) Contact Touch pint: allows you to create a Touch Point alert associated to a Contact. 3) Lead Touch Point: allows you to create a Touch Point alert associated to a lead within the Lead Management area of Gold-Vision 	
<p>The following example will illustrate how to create a Touch Point alert. The alert will create an Account Activity when a Touch Point score for an Account is greater than 100 and then assign this Activity to the Account Manager with the summary of 'Lead follow-up'.</p>	
<p>Select 'Account Touch Point'</p>	

In the Alert text field this can be named 'Create Account Activity when TP > 100'
 In the 'Raises over' field enter 100 (this will cause the alert to fire when the Touch Point score is greater than 100).
 The Touch Point configurations list allows you to select a certain Touch Point(s) that have previously been configured in order to fire the alert. If no values are selected the overall Touch Point score is used for the alert to fire (the account Touch Point score in this example).
 For the purposes of this example do not select any Touch Point configuration items.

Add a New Action allows you to specify what you would like to happen when the above conditions are met.
 Click 'Add Action', select 'Create a New Activity'

Click the 'Configure and manage data settings' option that will now be displayed.

This will then allow you to set the default values for the Activity that is created.

Check the summary field and enter the following value 'Lead follow-up' (this will default the name of the activity to Lead follow-up)
 Check the owner field and select 'Account Manager' from the drop down list (this will set the associated Account Manager as the owner of the created Activity)

Once done click **Save**. Click **activate** at the bottom of the screen to enable the Alert. The Alert will now create an Account Activity assigned to the Account Manager with the summary 'Lead follow-up' when the Touch Point score for the Account is greater than 100

➤ **Creating Touch Points from Alerts**

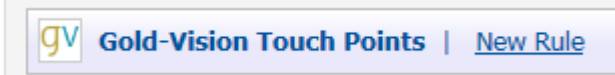
A new Alert action has been added to allow Touch Points to be added to an Item.
 For example – **you may want to give a Touch Point score of 100 if an Opportunity of over £10,000 is created.**

Setting up Touch Points from Alerts is a two step process:

1. Create a Touch Point with a type of 'Manual'
2. Create an Alert adding this Touch Point as an Action

Create the Manual Touch Point

Data → Touch Points → Configure Touch Point Rules
 Select Gold-Vision Touch Points - New Rule



Enter the Name, select Action Type **Alerting** and enter a score, Save

Touch Point Rule - New (Gold-Vision Touch Points)

Details
 Enter a name to identify this rule and select an optional category.

Name:

Category:

Active: Yes No
Import and scoring will only occur when the configuration is active.

Action Types
 Import the following actions. If no options are selected then no data will be imported.

Actions: Manual **Alerting**

Scoring
 You can apply a score to any data imported using this definition plus an ageing setting that will cause the score to degrade over time.

Initial Score:

Degrade Score: every hours

Zero Score:

Create an Alert

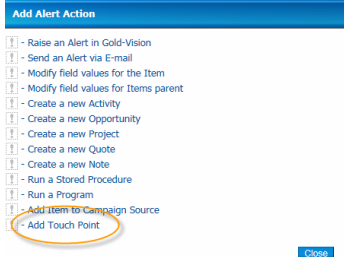

Alerting → Configure Alerting → New Alert → On Save Alert → Select Opportunity

Enter a name for the Alert
 Add a Condition eg
 When a numeric range has been reached

 Add a figure eg 10,000 in the 'Greater than' field

Add 'On-Save' Alert Condition

- When a drop-down option is selected
- When a checkbox is ticked
- When specific text is entered
- When any text is entered
- When a date has passed
- When a date is due
- When a numeric range has been reached
- When a value changes
- When any value in a group changes
- When this item is created
- When this item is updated
- When this item is created or updated
- When the update is from a specific source
- When this item is integrated
- When this item is not integrated
- When item is linked to Financial Entity

<p>Add an Action Select Add Touch Point</p>	
<p>Select the Touch Point Click Save and Activate</p>	

Configure Alert - High Value Opportunity

Alert Type: Opportunity 'On-Save' - Created by Nikki Bugla 2 on 20/11/2014. Last updated by Nikki Bugla 2 on 20/11/2014.

Alert Text: High Value Opportunity - This is displayed to user when alert fires.

Notes: Opportunity

Alert Conditions - What causes this alert to 'fire'?

These conditions will be evaluated when these items are created or updated: Opportunity

Number Value Greater Than 10000

Alert Actions - What to do when alert conditions are met?

Add Touch Point High Value Opportunity

Activate Save Close This alert is de-activated and will not fire.

Once an Opportunity of over £10,000 is added, the Alert will fire and the Touch Point will be added:

