WINE D–RECT

Summer Training Series
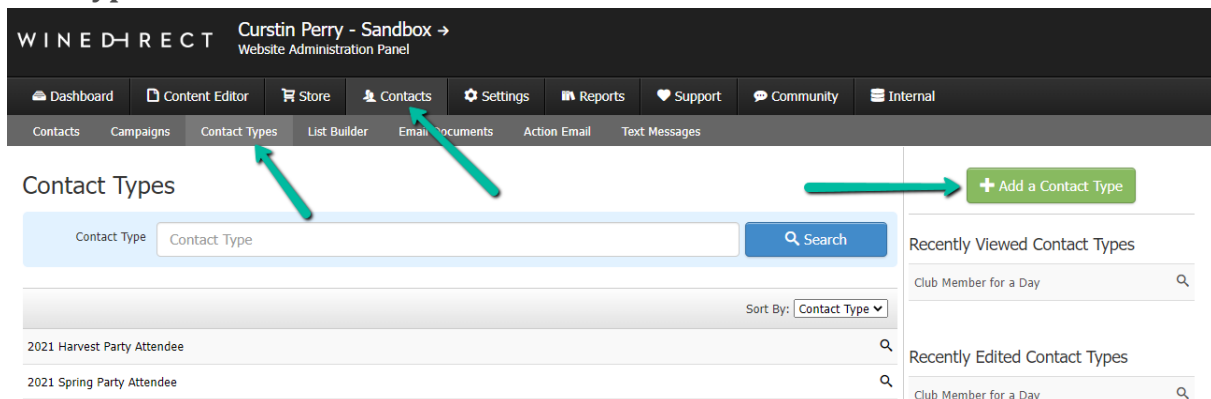
Improving Customer Data Acquisition

Follow this step-by-step guide to create a more efficient, accurate, and enticing "touchless" customer data acquisition form that can be utilized in the tasting room or at offsite events. Steps:

1. Create a Contact Type
2. Make a Single-Use Promo
3. Build a Form
4. Add Your Form to Your Kiosk Page
5. Generate a QR Code

STEP 1: CREATE A CONTACT TYPE

Within the main tab **Contacts**, select the sub-tab **Contact Types,** and then the green **Add a Contact Type** button.

Use the same name for your contact type, promo, and form. You'll also want to ensure your contact type is deletable but not public.

STEP 2: MAKE A SINGLE-USE PROMO

Within the main tab **Store**, select the sub-tab **Promos,** and then the green **Add a Promo** button.

Be sure to use the same name as the contact type you already created. Adjust the **Available To** to **Specific Contact Types** and **Limit Use** to **Limit Per Customer** and **1 Use Per Customer**. The general information of your promo should look something like this:

Then add the newly created contact type and specify the desired discount amount.

STEP 3: BUILD A FORM

Within the main Content Editor tab, hover your cursor over the sub tab Components and select **Forms.** Next, select the green **Add a Form** button.
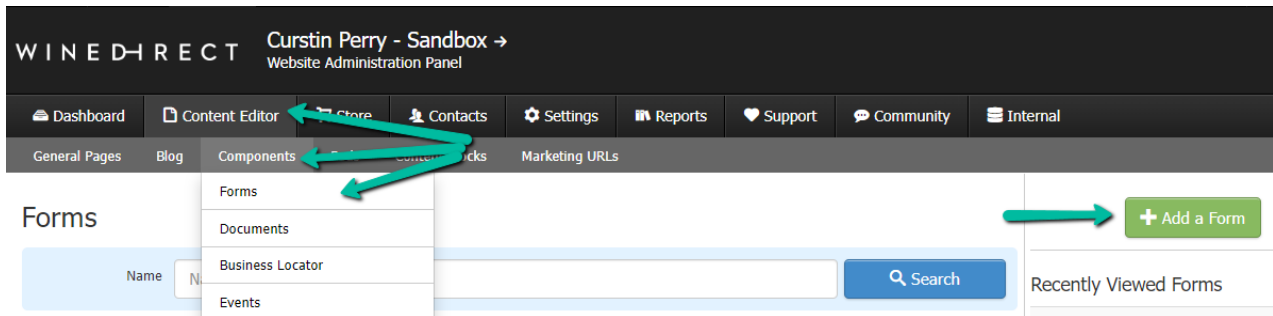
Add the form name and be sure to select **Is Tied to Contact** and select the previously created contact type.

If desired, you can select to show an opt-in checkbox below the email address field for customers to opt in to email marketing.

You'll then need to add questions from the **Preset Fields** section. These preset fields will tie to the customer's account, so any information the customer inputs in these preset fields, such as their phone number, will automatically be inputted into the customer's account information. If desired, you can also include **Create Account,** which will prompt the customer to create a username and password for your website (this will only work for new customer accounts). **Note:** The system determines whether this is a new customer account by the customer's email address. If the email inputted already exists within the company's database, then the system will update the customer's account information to reflect what was filled out in the form. If the inputted email address does not already exist in the company's database, then the system will create a new account for the customer.

You can determine which fields the customer must fill out by checking the **Is Required** box. An asterisk will appear if a field is required.

Form Questions	
Preset Fields	First Name
	☑ Is Required?

Cancel   Save

Once you've chosen your preset field questions, your form should look something like this, depending on which questions you decided to require the customer to fill out.

Form Questions			
			+ Add Question
First Name *	First Name	Edit	Remove
Last Name *	Last Name	Edit	Remove
Address	Address	Edit	Remove
Address2	Address2	Edit	Remove
City	City	Edit	Remove
State Code		Edit	Remove
Zip Code	Zip Code	Edit	Remove
Phone *	Phone	Edit	Remove
Email *	Email		
	☐ Opt into mailing list		

If you'd like, you can also set up a thank you message, which will immediately display after the form has been filled out. You can also create or use an existing email for an automatic email response. This email will be sent out immediately after the customer fills out the form and cannot be delayed.

Thank You Message
No Thank You Message Added.

Edit

| Automatic Email Response |
| --- |
| No Automatic Email Response Added. |

Edit

STEP 4: ADD YOUR FORM TO YOUR KIOSK PAGE

Within the main tab, **Content Editor**, hover your cursor over the sub-tab **General Pages,** and select **Kiosk Pages**.

If you are not currently using the **Homepage**, you can use this page for your form, or you can select the green **Add a Kiosk Page** button to create a new kiosk page. If you do not have access to your kiosk pages, please reach out to support@winedirect.com.
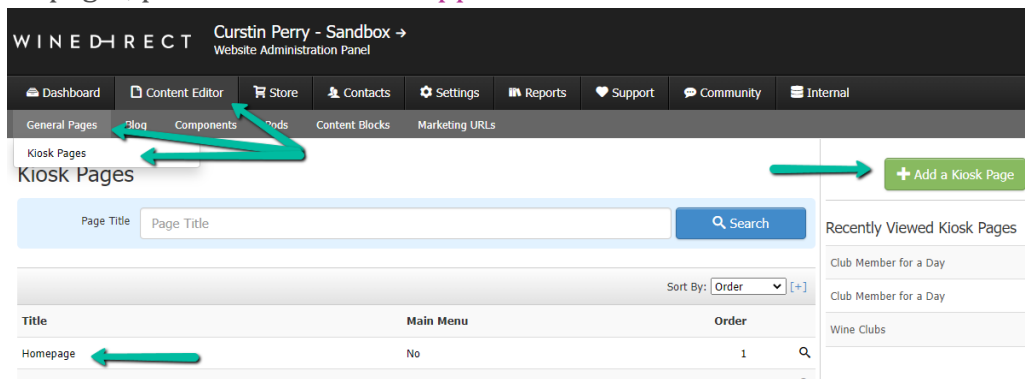
Within the WYSIWYG, select the gear icon and select the appropriate form. Title the page accordingly and, if needed, determine the order of the page. The lower the number the higher the priority.
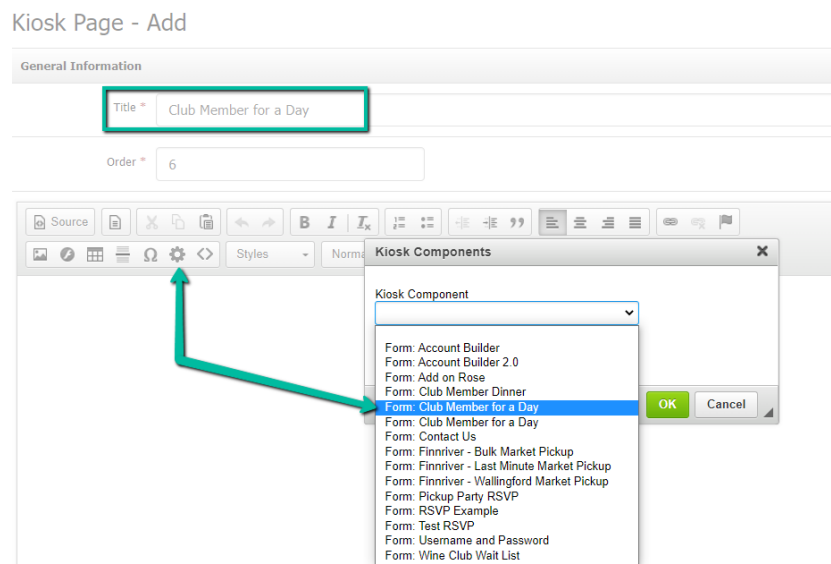
Once you're done, your kiosk page should look something like this.

Kiosk Page - Club Member for a Day

General Information

Title	**Club Member for a Day**
Order	**6**

[[Club Member for a Day:Component:8081E146-D78E-388B-193C-280D5EBC952E]]

Added: 06/07/2022 | Modified: 06/07/2022 | by Curstin Perry

✎ Edit

Properties

Active	**Yes**	Layout	**Default Layout**
Main Menu	**Yes**	Hidden Page	**No**

✎ Edit

✖ Delete   ☰ Return to List

To access your kiosk pages, add **.vin65kiosk** before the .com on your company's website. For example, if my sandbox's website is https://curstinperrywines.com/, I'll add .vin65kiosk as such: https://curstinperrywines.vin65kiosk.com/.

STEP 5: GENERATE A QR CODE

A great, free QR code generator online is QR Code Monkey. This site allows you to add a company logo, adjust colors, and edit the design of your QR code. Here, you can enter your kiosk page URL, customize your QR code, and generate your QR code for use in your tasting room or at events.

We're Here to Help!

Have further questions? Are you interested in additional training? Our trainers are here to assist! For questions or training inquiries, please get in touch with training@winedirect.com. The WineDirect Academy is an excellent resource for training, courses, videos, and more!