

WINE DIRECT

Summer Training Series

Improving Customer Data Acquisition

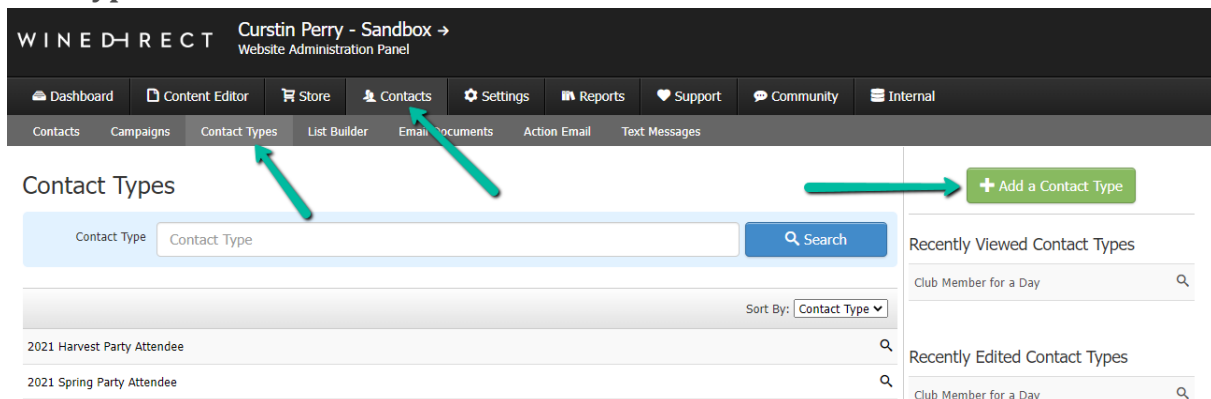
Follow this step-by-step guide to create a more efficient, accurate, and enticing "touchless" customer data acquisition form that can be utilized in the tasting room or at offsite events.

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.



The screenshot displays the Wine Direct Website Administration Panel. The top navigation bar includes 'Dashboard', 'Content Editor', 'Store', 'Contacts', 'Settings', 'Reports', 'Support', 'Community', and 'Internal'. The 'Contacts' sub-tab is selected, and the 'Contact Types' sub-tab is active. A green arrow points to the 'Add a Contact Type' button. The main content area shows a search bar for Contact Types, a 'Sort By' dropdown set to 'Contact Type', and a list of existing contact types: '2021 Harvest Party Attendee' and '2021 Spring Party Attendee'. On the right, there are sections for 'Recently Viewed Contact Types' and 'Recently Edited Contact Types', both showing 'Club Member for a Day'.

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.

Contact Type - Add

General Information

Contact Type *

Is Public? Is Deletable?

Keyword

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.

The screenshot shows the Wine Direct website administration panel. The top navigation bar includes 'Dashboard', 'Content Editor', 'Store', 'Contacts', 'Settings', 'Reports', 'Support', 'Community', and 'Internal'. Below this, a secondary navigation bar lists various sub-sections: 'Orders', 'Products', 'Inventory', 'State Profile', 'Shipping', 'Price Levels', 'Clubs', 'Allocations', 'Gift Cards', 'Promos', 'Searches', and 'Loyalty Points'. The 'Promos' sub-tab is selected, and a green arrow points to the '+ Add a Promo' button. The main content area shows a search bar for 'Name' and a 'Search' button. Below the search bar, there is a 'Status: Active | Back to Default' link and an 'Advanced' dropdown menu. On the right side, there is a 'Promo Properties' section with a 'Manage Promo Categories' link and a search icon.

Be sure to use the same name as the contact type you already created. Adjust the **Available 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:

Promo - Add

General Information

Type: Discount Off

Name: Club Member for a Day

Code: Code Available To: Specific Contact Types

Product Selection: Promotion On Entire Store

Starts: MM/DD/YYYY Expiry: MM/DD/YYYY

Limit Use: Limit Per Customer Uses: 1 Uses Per Customer

Allow Show Coupon on List in POS POS Coupon Name: POS Coupon Name

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

Contact Types

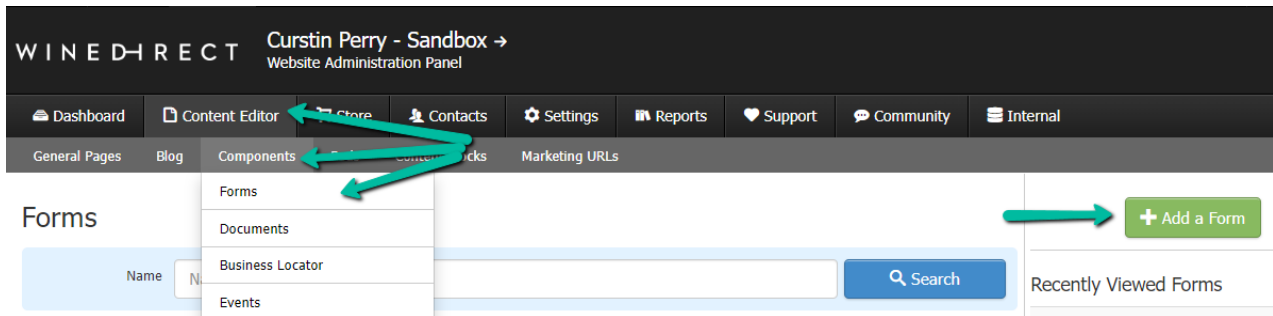
Contact Types: Club Member for a Day

Discount

Product Promo Type	Percent Off	Promo 10.00 % Off
Shipping Promo Type	Percent Off	Promo 0.00 % Off
Shipping On	Entire Order	
Order Total From	\$0.00	To
Quantity From	0	To
Include subSkus (Items in Bundle) when doing a quantity count	No	

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.

Form - Add

General Information

Form Name * Email Results To

Is Tied to Contact? Form Width px

Contact Types

<input type="checkbox"/> 2021 Harvest Party Attendee	<input type="checkbox"/> Industry
<input type="checkbox"/> 2021 Spring Party Attendee	<input type="checkbox"/> Red Wine Only
<input type="checkbox"/> Account Builder	<input type="checkbox"/> Test
<input type="checkbox"/> Add on Rose	<input type="checkbox"/> The Endgame Club
<input type="checkbox"/> Breakage Promo	<input type="checkbox"/> The First Avenger Club
<input type="checkbox"/> Club Member Dinner Attendee	<input type="checkbox"/> The Infinity Club
<input checked="" type="checkbox"/> Club Member for a Day	<input type="checkbox"/> TR Account Builder
<input type="checkbox"/> Corked Promo	<input type="checkbox"/> TR Samples Promo
<input type="checkbox"/> Donation Promo	<input type="checkbox"/> Whiskey
<input type="checkbox"/> Email Test	<input type="checkbox"/> White Wine Only
<input type="checkbox"/> Employee	<input type="checkbox"/> Wholesale
<input type="checkbox"/> Event Wine Promo	<input type="checkbox"/> Wine Club Wait List
<input type="checkbox"/> Good Faith Promo	

[+ Advanced](#)

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

Subscription Settings

Show Opt In Checkbox **Yes** Unsubscribe Contact On Submit **No**

[Edit](#)

Form Questions

[+ Add Question](#)

Email *

Opt into mailing list

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.

Form Questions

Preset Fields	<input type="text"/>
Question Type *	<ul style="list-style-type: none">First NameLast NameCompanyAddressAddress2CityState CodeZip CodePhoneCreate Account
Question *	
Order *	

[+ Advanced](#)

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

Is Required?

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

First Name *	<input type="text" value="First Name"/>	<input type="button" value="Edit"/>	<input type="button" value="Remove"/>
Last Name *	<input type="text" value="Last Name"/>	<input type="button" value="Edit"/>	<input type="button" value="Remove"/>
Address	<input type="text" value="Address"/>	<input type="button" value="Edit"/>	<input type="button" value="Remove"/>
Address2	<input type="text" value="Address2"/>	<input type="button" value="Edit"/>	<input type="button" value="Remove"/>
City	<input type="text" value="City"/>	<input type="button" value="Edit"/>	<input type="button" value="Remove"/>
State Code	<input type="text" value=""/>	<input type="button" value="Edit"/>	<input type="button" value="Remove"/>
Zip Code	<input type="text" value="Zip Code"/>	<input type="button" value="Edit"/>	<input type="button" value="Remove"/>
Phone *	<input type="text" value="Phone"/>	<input type="button" value="Edit"/>	<input type="button" value="Remove"/>
Email *	<input type="text" value="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.

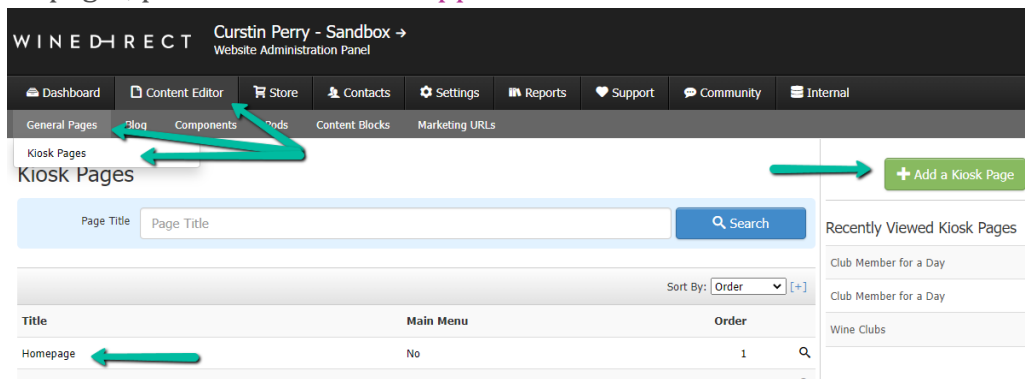
Automatic Email Response

No Automatic Email Response Added.

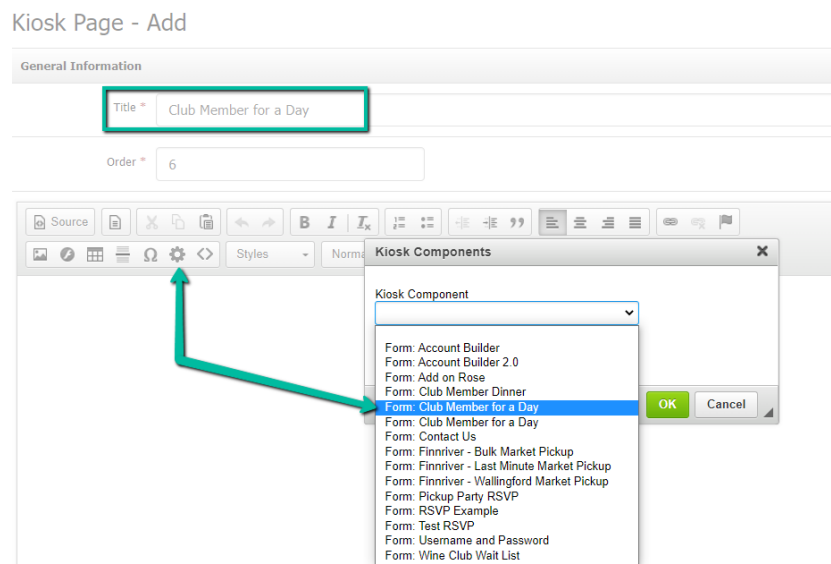
STEP 4: ADD YOUR FORM TO YOUR KIOSK PAGE

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	
X 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.

WINE DIRECT

THE WINERY'S CHAMPION

WINEDIRECT.COM

The interface shows a menu with four options: 'ENTER CONTENT', 'SET COLORS', 'ADD LOGO IMAGE', and 'CUSTOMIZE DESIGN'. Below the menu are three sections of customization options:

- Body Shape:** A grid of 20 different QR code body patterns, with the third option in the first row selected.
- Eye Frame Shape:** A grid of 15 different eye frame styles, with the first option in the first row selected.
- Eye Ball Shape:** A grid of 15 different eye ball styles, with the first option in the first row selected.



Low Quality 1000 x 1000 Px High Quality

Create QR Code

Download PNG

.SVG

.PDF*

.EPS*

* no support for color gradients

The created static QR code is 100% free but if you need **scan statistics**, **flexible editability** and **more features** then have a look at our **QR Code Generator** for professionals.

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!