



CherryPie
powered by PassKit

The User Guide

CHEAT SHEET



**STEP ONE
CREATE A
CLIENT**



**STEP TWO
CREATE A
CONTACT LIST**



**STEP THREE
UPLOAD
ASSETS**



**STEP FOUR
CREATE
TEMPLATE(S)**



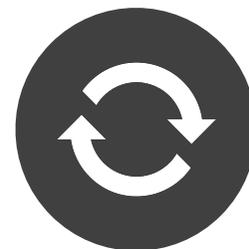
**STEP FIVE
CREATE A
CAMPAIGN**



**STEP SIX
DISTRIBUTE**



**STEP SEVEN
SEND NOTI-
FICATIONS**



**STEP EIGHT
REPEAT.**



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THIS GUIDE WILL TEACH YOU HOW TO BECOME A SUCCESSFUL **CHERRYPIE USER SO THAT YOU CAN EASILY & EFFICIENTLY LAUNCH MOBILE WALLET MARKETING CAMPAIGNS.**



1. EDIT YOUR PROFILE

Click on the the dropdown in the top right of the screen, and select 'Edit Profile' to add your name, select your country, and update your password.

The screenshot shows a web browser window displaying the CherryPie user profile edit page. The page title is "Edit" and the breadcrumb is "Users / Edit". The user is logged in as "Wendy" under the client "wendy". The page contains two main sections: "User Details" and "Change Password".

User Details

First Name	Wendy	Email	wendy@passkit.com
Middle Name		Country	Hong Kong
Last Name	Chan		

Change Password

Current Password
New Password	
Confirm New Password	

Buttons: Reset, Save Changes

This close-up shows the user profile dropdown menu in the top right corner of the page. The menu is open, showing the following options:

- Client: wendy
- Wendy
- Edit Profile
- Logout



2. ADD CLIENTS

When you first log in to CherryPie, your default client is yourself.

Before you do anything, make sure you create a new client. This is because all of the contacts, assets, campaigns, and templates are stored per client and cannot be copied over. Make sure you that you are working on the right client every time you use CherryPie.

Go to Clients —> New Client

To switch between clients, simply go to the top right of the screen and select your client from the dropdown list.

The screenshot displays the CherryPie web application interface. On the left is a navigation sidebar with options: Dashboard, Campaigns, Offers, CRM, Assets, Clients (highlighted), and Analytics. The main content area shows the 'Clients' page with a search bar and a table of existing clients. A dropdown menu is open at the top right, showing the current client 'wendy' and a 'New Client' button. A modal window titled 'Add a Client' is overlaid on the right, containing fields for 'Name *' (Required) and 'Description' (Optional), along with 'Cancel' and 'Save' buttons. The table below the modal lists clients: NBA, Under Armour, Kit, and PassKit, each with progress indicators for Pass, SMS, and Email.

Client	Pass	SMS	Email
wendy	0 / 100	0 / 100	0 / 100
NBA	0 / 100	0 / 100	0 / 100
Under Armour	0 / 100	0 / 100	0 / 100
Kit	0 / 100	0 / 100	0 / 100
PassKit	0 / 100	0 / 100	0 / 100



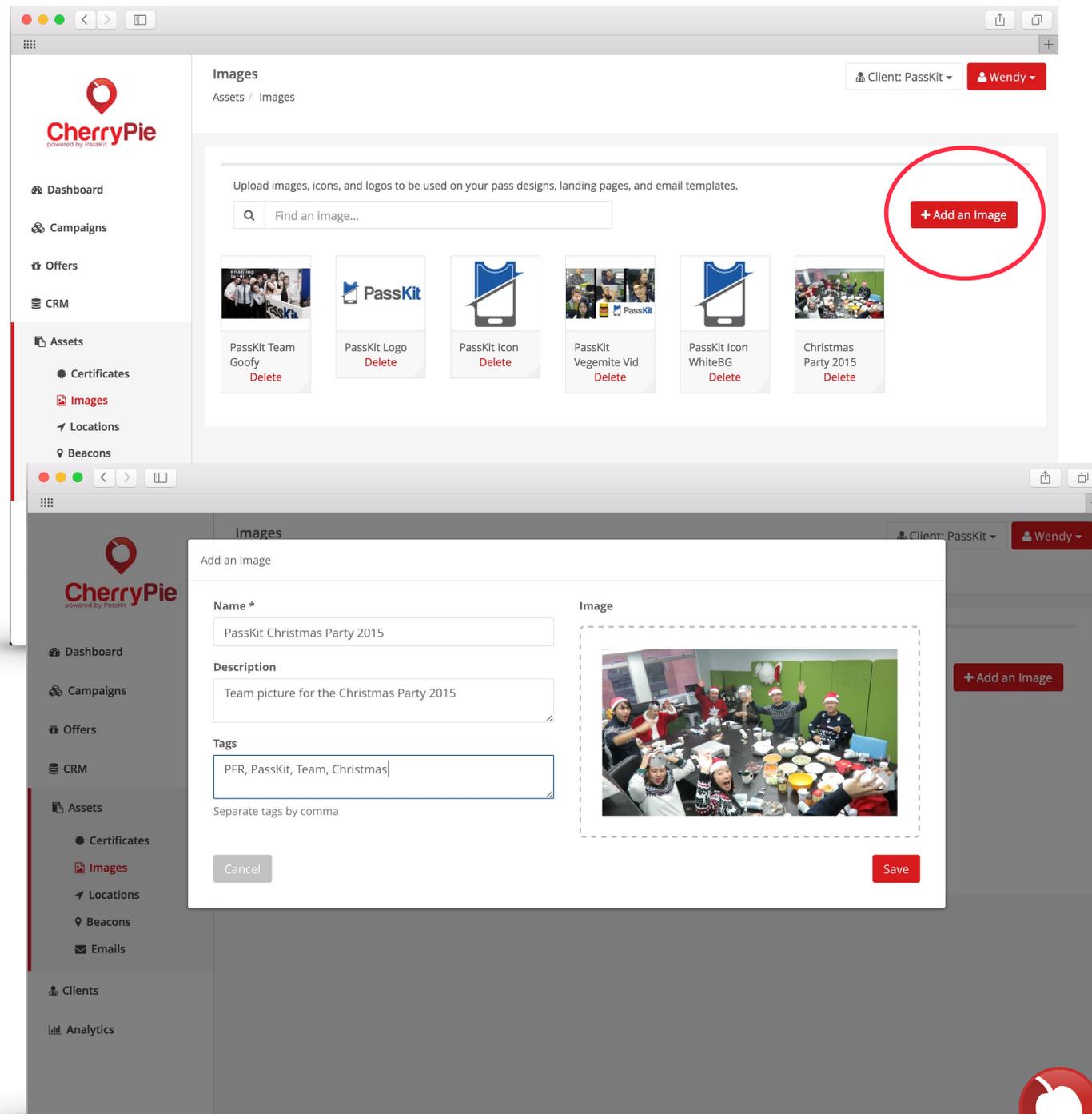
3. ADD ASSETS

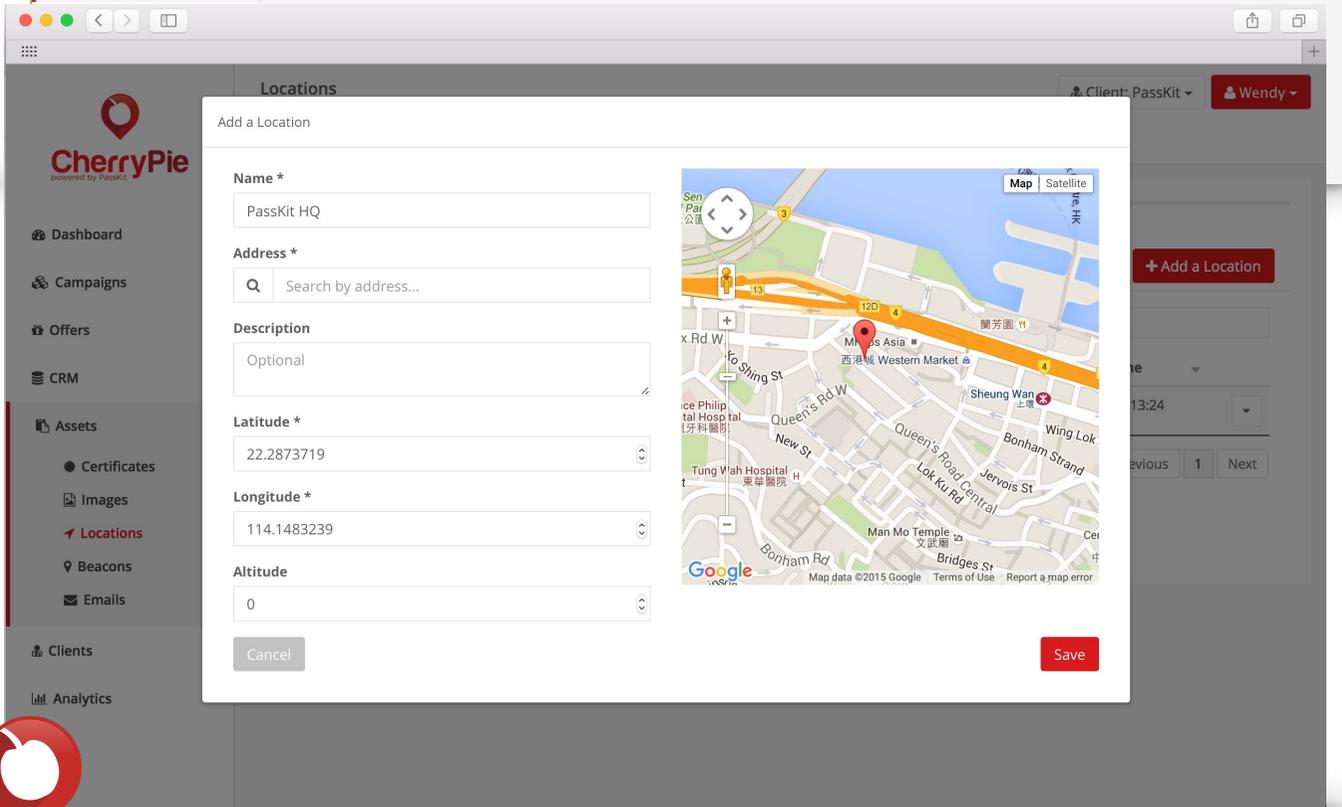
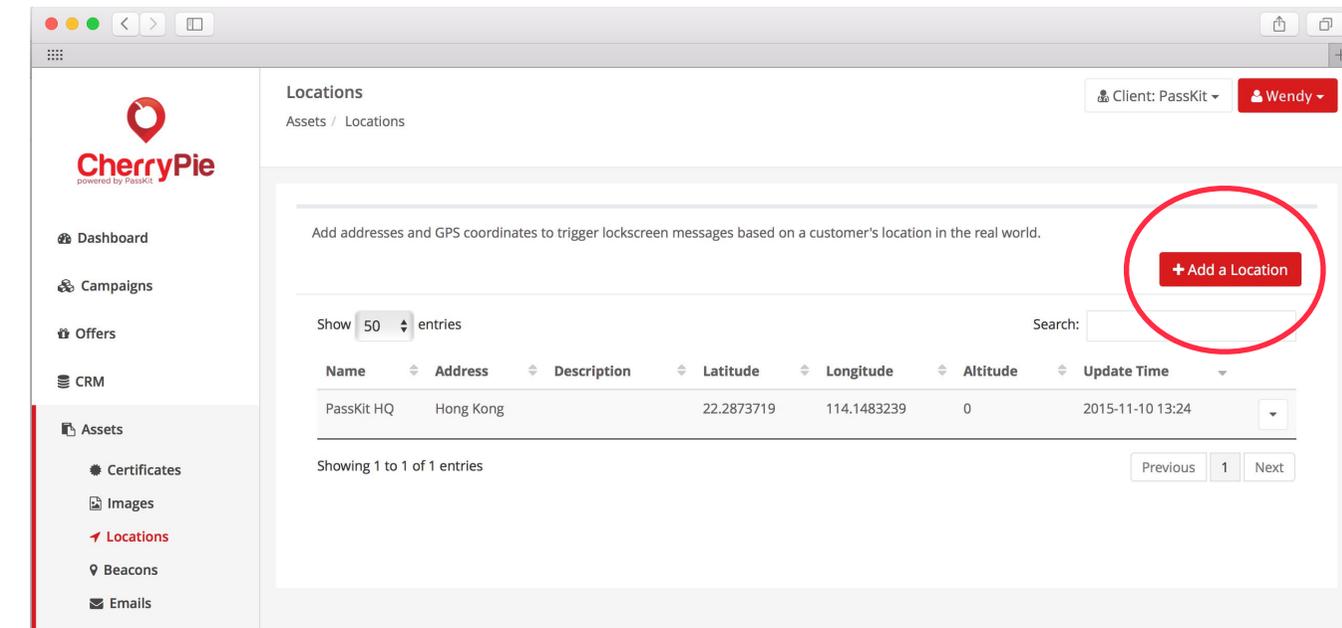
3A ADD IMAGES

This is where you'll store all your image assets, which can be used in the pass, email template, and landing page. Don't worry about cropping it to be the right size - we have cropping tools in the 'design' section of creating your pass and adding it to the landing page.

Go to Assets → Images → Add an Image

Enter a name for that image and add a description or tag (for search purposes), then select your image or drag and drop it in the box.





3B ADD LOCATIONS

Add and store locations for location-based lock screen alerts with passes. This will trigger a lock screen message whenever that device is within the range of the GPS coordinates.

Go to Assets —> Locations —> Add a Location

Enter a name for that location and type in the address to search for it on the map. Click and hold to position the map marker in the exact location you want it and the latitude and longitude will automatically be generated.

To enable GPS lock screen message to appear only above a certain height (i.e. on the 60th floor of a building), add in the altitude in meters.

3C ADD BEACONS

Add and store beacons for proximity-based lock screen alerts with passes. This will trigger a lock screen message whenever that device is within range of a beacon.

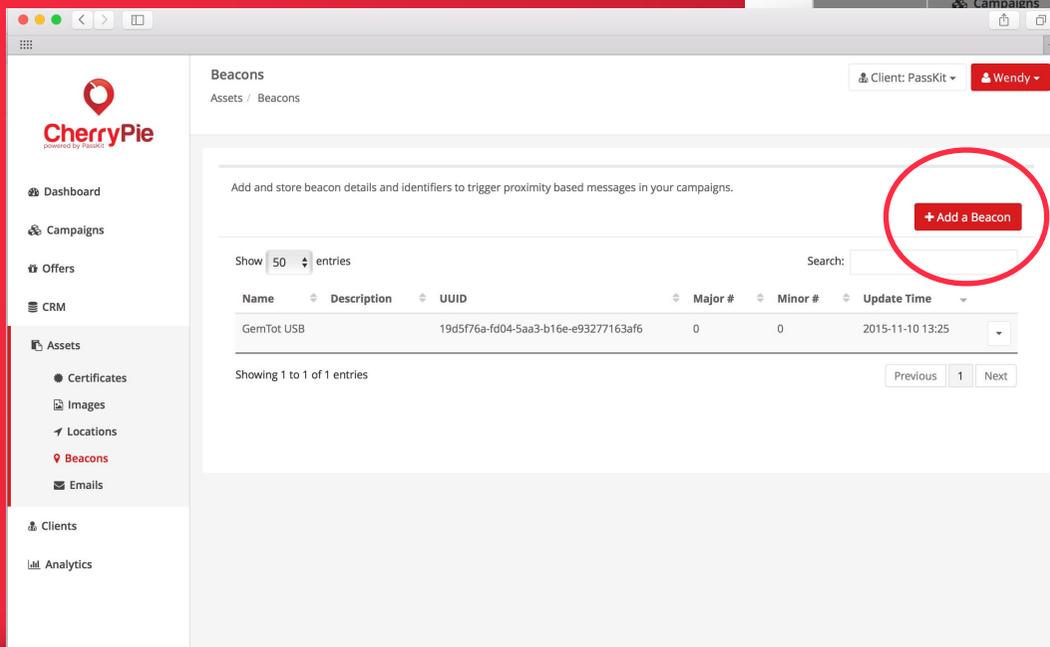
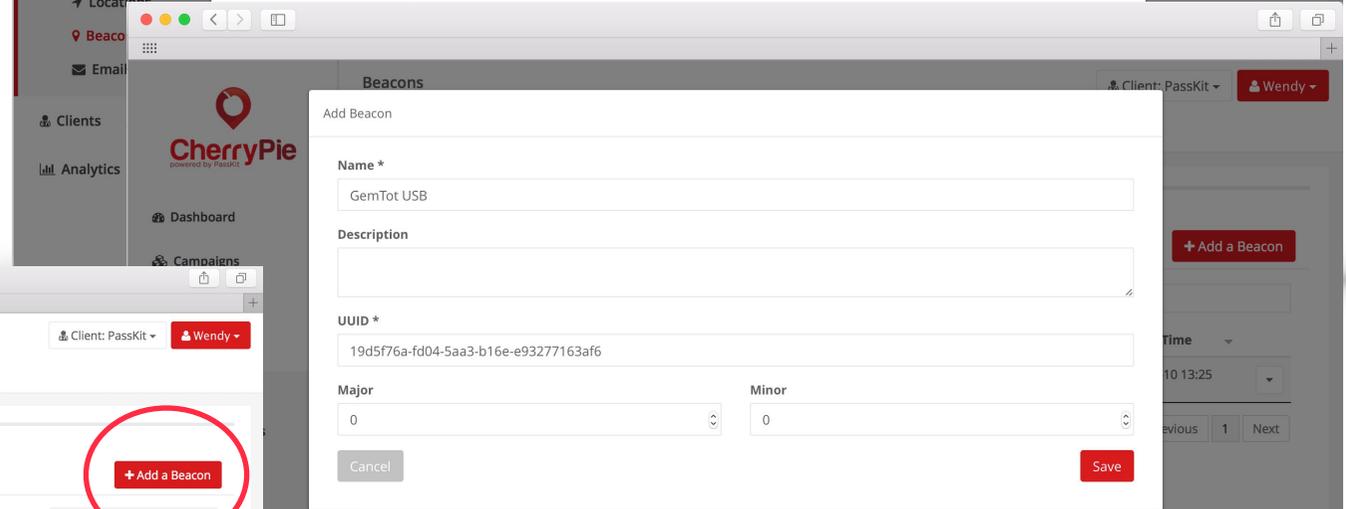
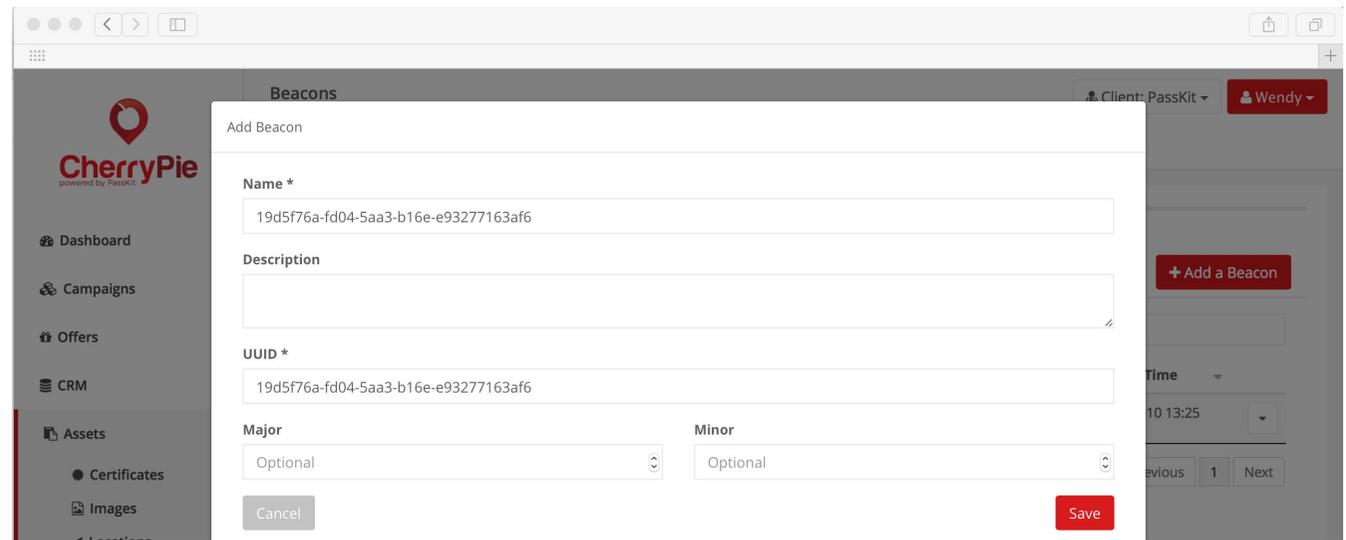
Go to Assets → Beacons → Add a Beacon

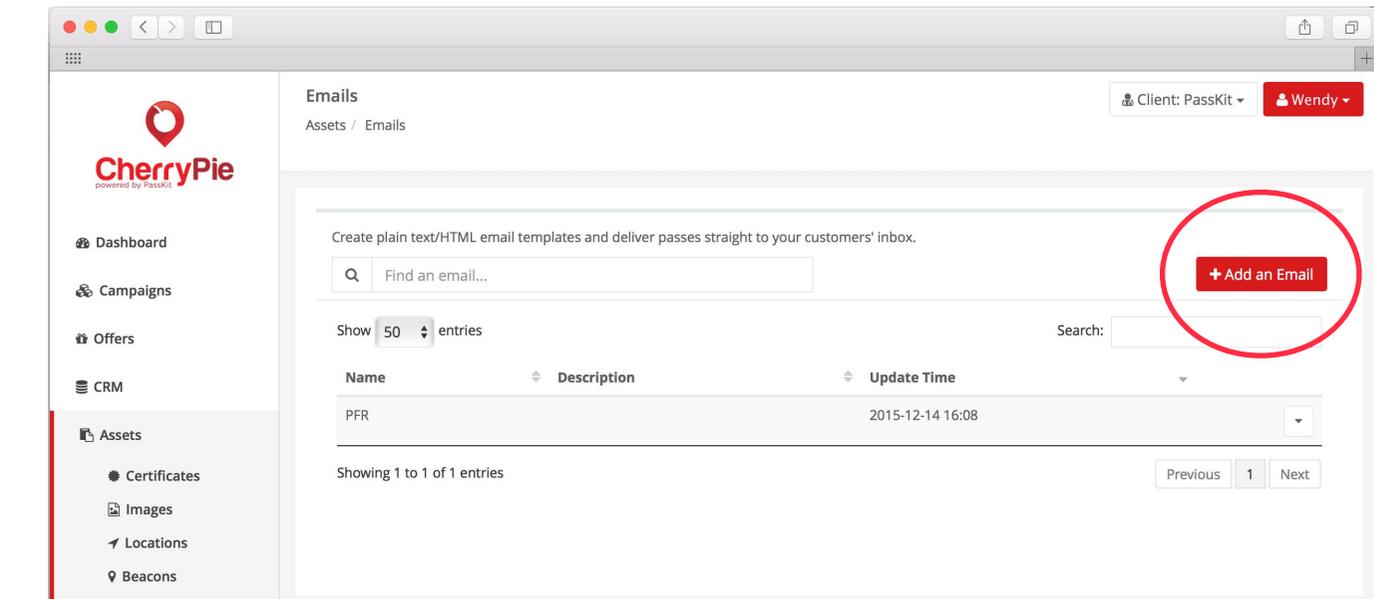
Option 1:

Enter in a name (i.e. GemTot USB) and a UUID is automatically generated for you. This is the default UUID for GemTot Beacons.

Option 2:

If you already have a UUID, enter your UUID in the 'Name' field. If your UUID is valid, it will be the same in the UUID field. Ensure that you've added hyphens in the right place of the UUID like this: 19d5f76a-fd04-5aa3-b16e-e93277163af6.





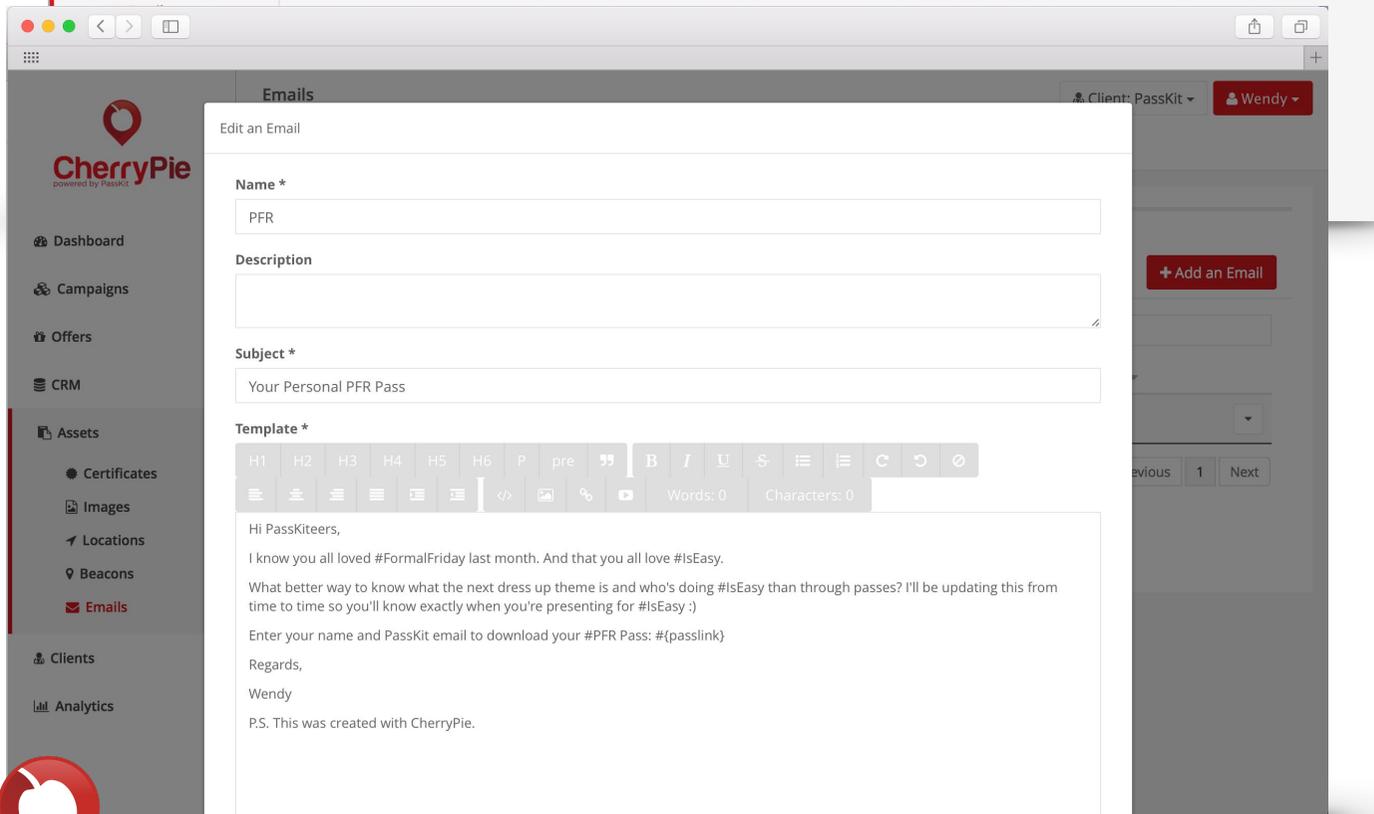
3D ADD EMAIL TEMPLATES

Create and store plain-text or HTML email templates so that you can distribute passes and launch campaigns to your contact list straight away. If you've set up customer segmentations, you can also send emails to specific segments only.

Go to Assets —> Emails —> Add an Email

Here are some shortcodes you can use in your email:

- `#{passlink}` - the URL of the pass
- `${FirstName}` - Field that can be edited by customers
- `#{Balance}` - Field that cannot be edited by customers
- `#{pid}` - the Pass ID



3E ADD CERTIFICATES

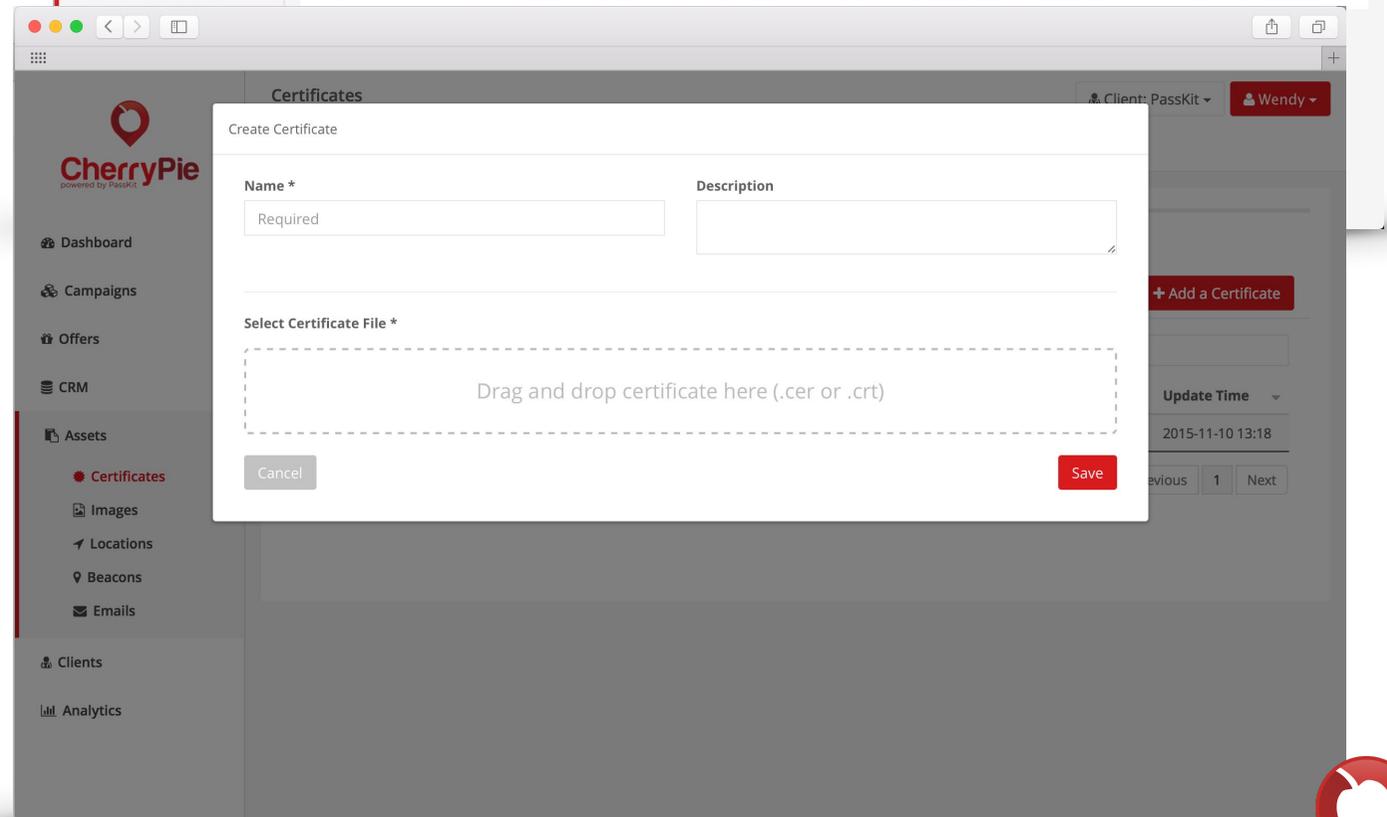
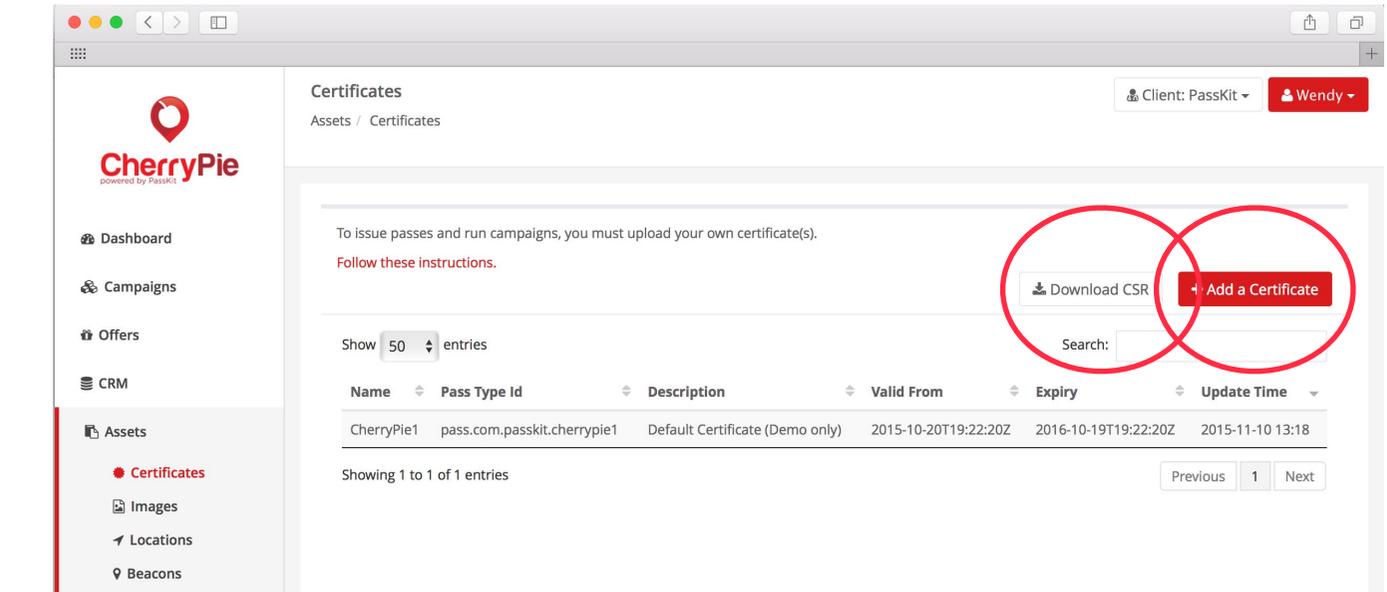
Apple requires that anyone who issues a pass must do so with their own certificate.

You will need an Apple Developer account (US\$99/year) which will allow you to upload as many certificates as you'd like.

1. Download the CSR
2. [Follow these instructions on uploading your certificate](#)
3. Click on 'Add a Certificate' to add the certificate you just created

Additional notes on certificates:

- You cannot change the certificate that is linked to a pass once you've saved the template
- Passes will stack in Apple Wallet if you use the same certificate for the same pass type (i.e. coupon).
- To prevent stacking of passes in Apple Wallet, we recommend using a different certificate for each pass you create.



4. CRM

4A: CREATE A CONTACT LIST

It's important that you create a contact list in the CRM, even if it's blank. This is so that when you launch your campaign and distribute passes, you are able to store customer data and see their history of actions in that contact list.

Go to CRM → Create Contact List

I don't have existing contacts

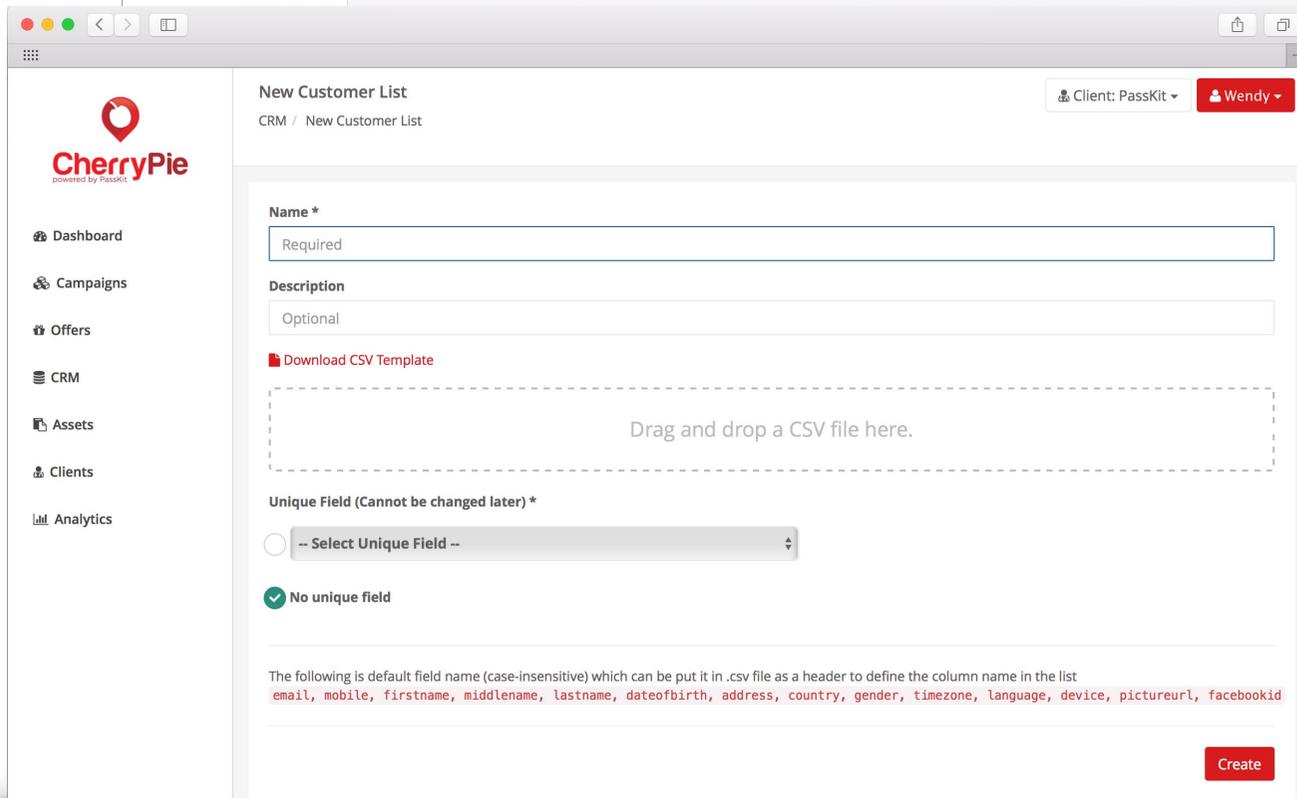
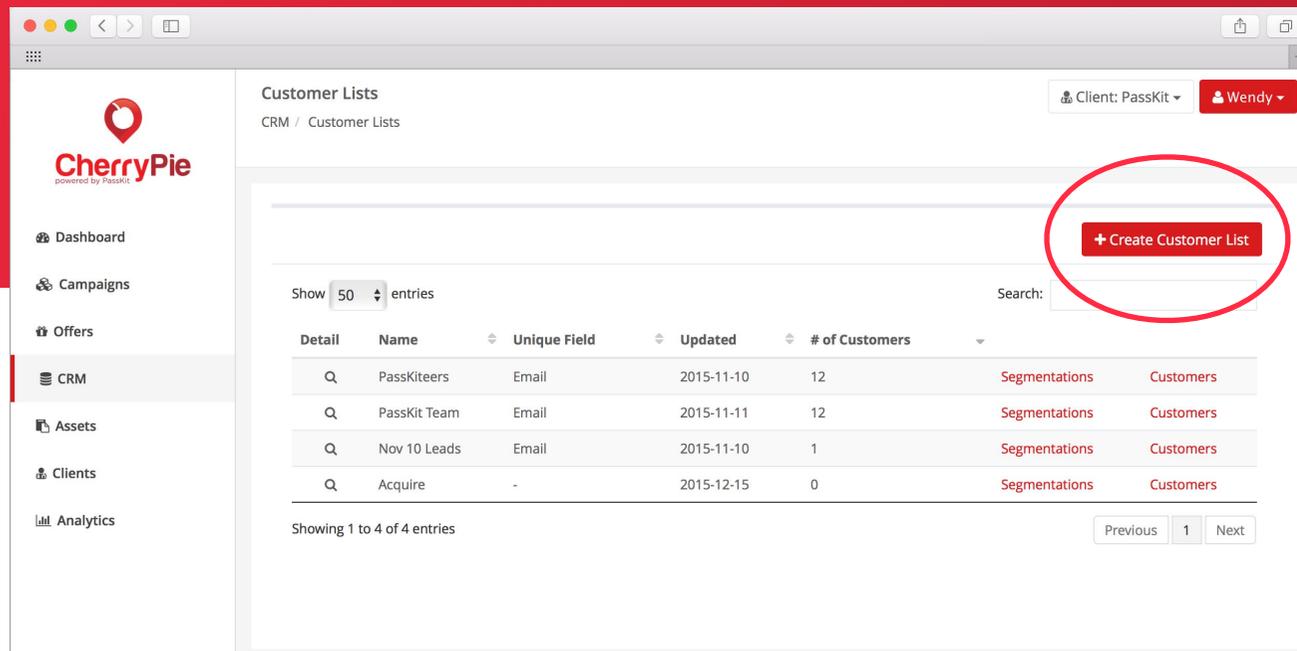
Enter a name for this contact list and save the contact list if you don't have contacts to upload at this time.

I have existing contacts

Download the CSV template to use as a template for uploading your existing contacts. We've provided default headings for each column but feel free to also add your own. These variables can be used in distributing passes and email templates (i.e. personalizing the email by name).

Unique fields

Unique fields are used to identify whether there is a duplicate in your contact list. For example, if you specify 'email' as the unique field, CherryPie will check to see if they are already in the contact list. This will help identify if a contact on the landing page or in the CSV is the same as the contact in the list or not. If you don't specify a unique field, CherryPie will not be able to check for duplicates.



4B: CREATE SEGMENTATIONS

Use the headers in your CSV to create segmentations of customers. For example, male/female, silver/platinum, status July birthdays, etc. Having customer segmentations allow you to send targeted content to the relevant contacts.

Once you've created your contact list, click on 'Segmentations' to create different segments. You can add multiple rules and conditions for each segment.

The screenshot shows the CherryPie CRM interface. The main content area is titled 'Customer Lists' and displays a table of customer lists. The table has the following columns: Detail, Name, Unique Field, Updated, and # of Customers. The data rows are:

Detail	Name	Unique Field	Updated	# of Customers
Q	PassKiteers	Email	2015-11-10	12
Q	PassKit Team	Email	2015-11-11	12
Q	Nov 10 Leads	Email	2015-11-10	1
Q	Acquire	-	2015-12-15	0

Each row has two links: 'Segmentations' and 'Customers'. A red circle highlights these links for all four rows. The interface also includes a sidebar with navigation options (Dashboard, Campaigns, Offers, CRM, Assets, Clients, Analytics), a top navigation bar with the CherryPie logo, and a top right area with client and user information.



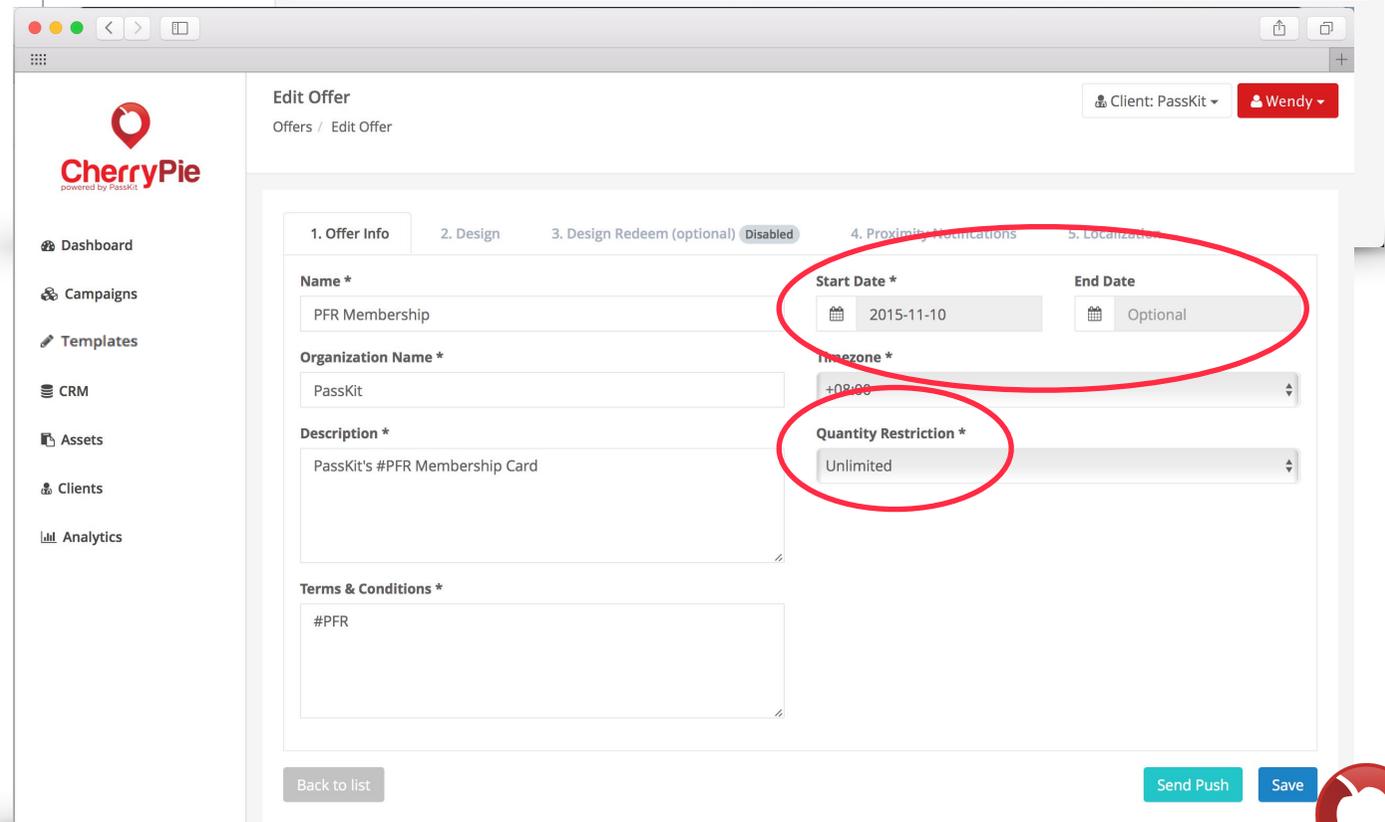
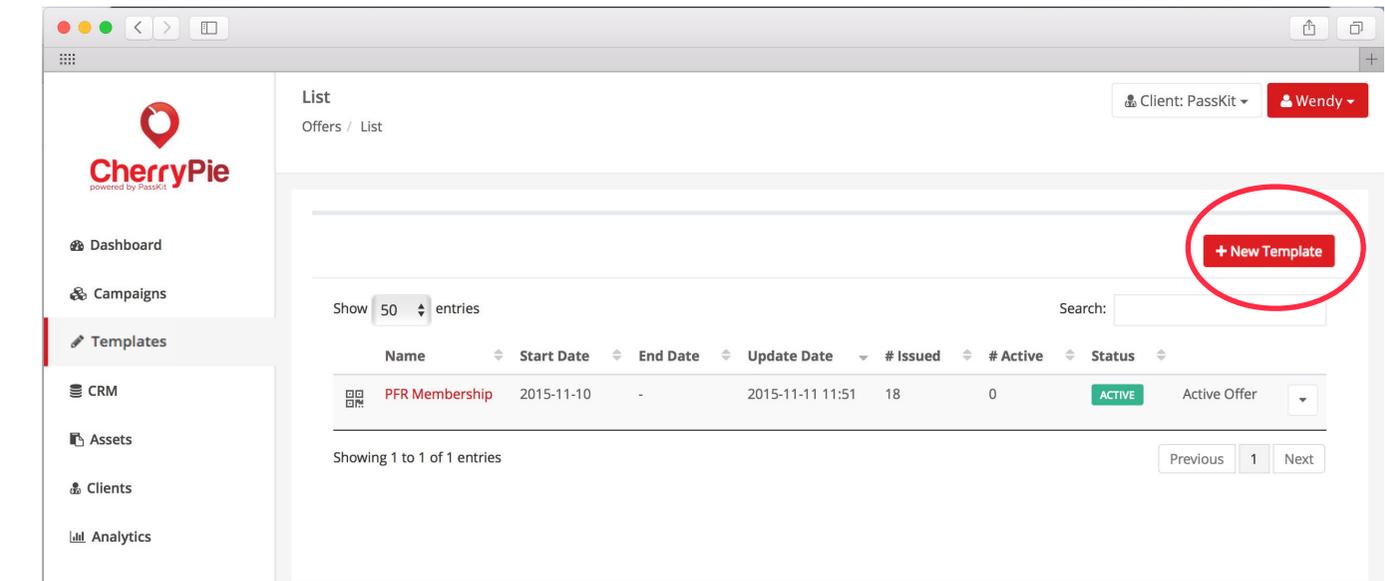
5. CREATING TEMPLATES

Design beautiful and engaging mobile wallet content with the WYSIWYG designer tool. Determine template details, build content, customize the design upon scan/redemption, add proximity notifications, and even translations to localize the pass to your demographic.

Go to Templates —> New Template

5A TEMPLATE INFO

Specify the template details and information here, including a start and end date (if applicable). This is particularly useful for coupons or event tickets that will expire after a certain date. If your template will never expire, then leave the 'end date' blank. The timezone is based on GMT and is used for delivering time based notifications. You can also choose to limit the quantity of passes to issue here.



5B DESIGN [FRONT]

1. TYPE

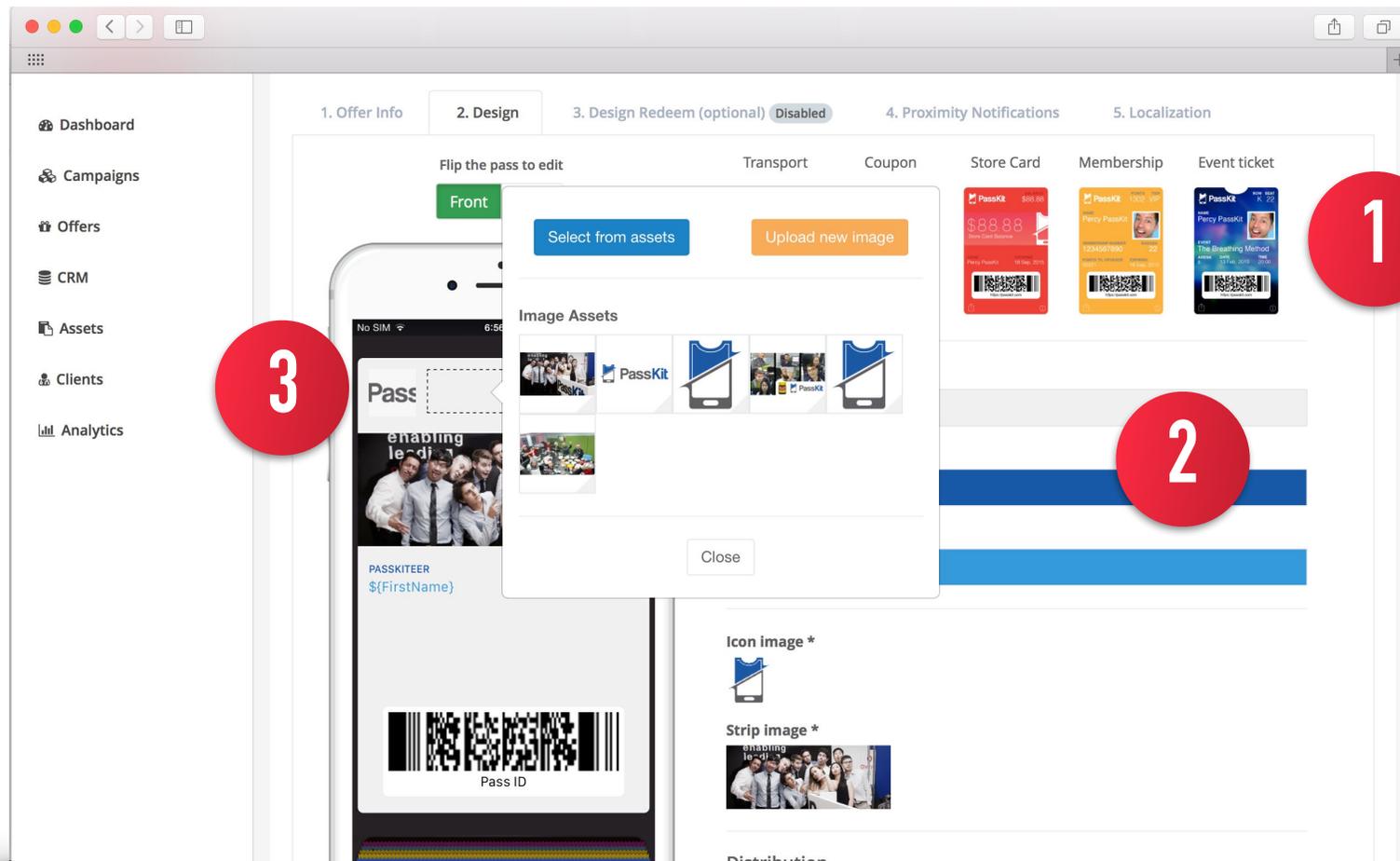
Select the type of wallet content you want to create (transport, coupon, store card, membership, or event ticket).

2. COLORS

Adjust the colors of the pass by entering in a HEX code or selecting from the color picker tool

3. IMAGES

Click on the area to the top left of the pass to add your logo image. Select from your image library or upload a new image here. Then scale, reposition, and crop if necessary. Follow the same steps to add the strip image, background image, and icon image.



4. TEXT

Hover over the pass design and click on the green + button to add text fields to a row. You can also click on existing text fields to edit the text.

Here are the different types of text fields you can create: **Variable, Fixed, Lockscreen**

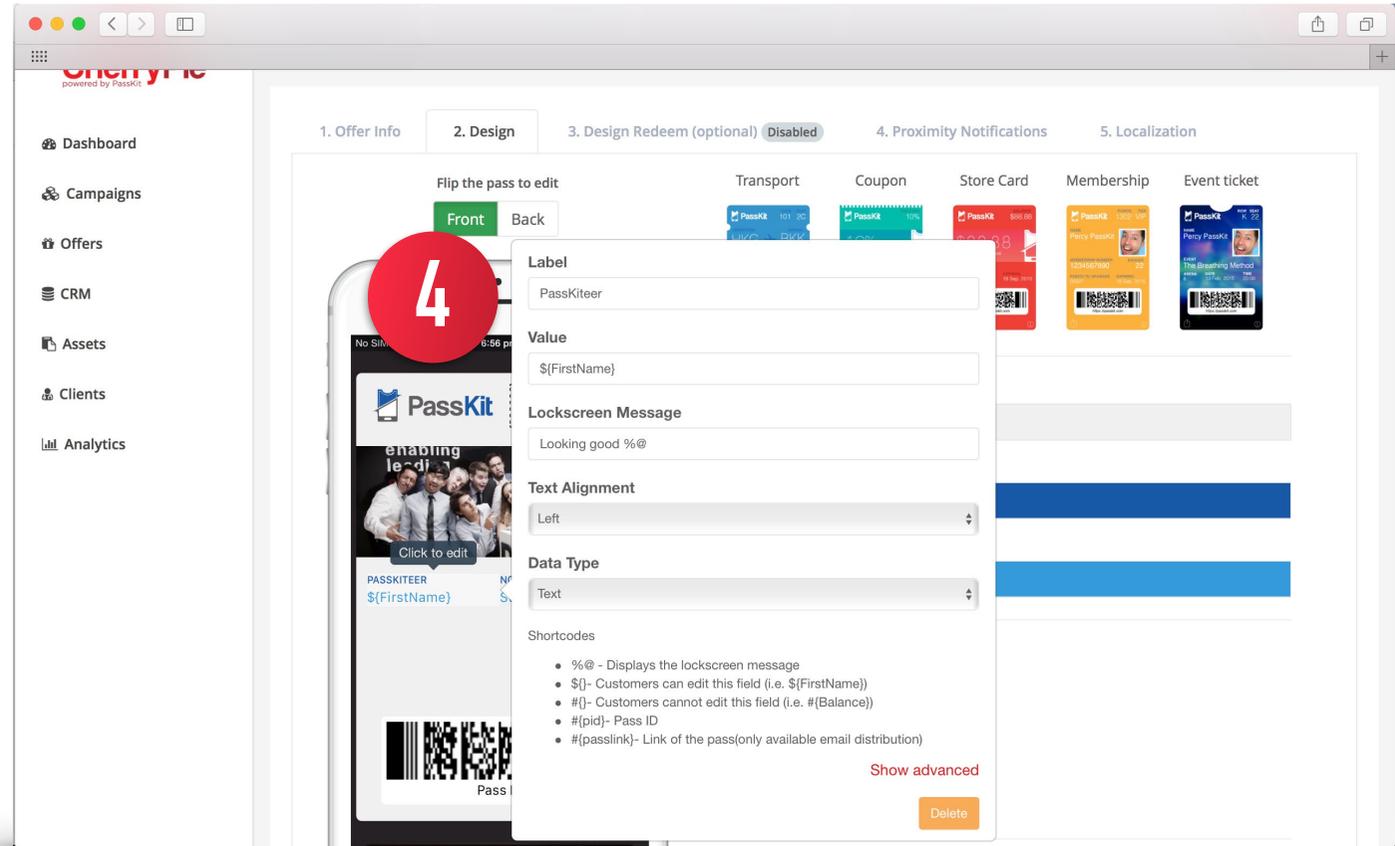
VARIABLE FIELD

(Customers cannot edit this field but it will change in the future): i.e. points balance, stored value balance, etc.

For example, a customers' point balance will change over time but you will not allow them to edit this field. Use `#{PointsBalance}` to denote this variable. The `#` means that this variable is not editable by customers. Again, the content inside the curly braces `{}` is case insensitive. The data collected here will be stored in your CRM (if you have set this up)

Variable field (to collect data from customers & allow them to change this field): i.e. name, email, mobile, etc.

If you want customers to enter their name, simply use this shortcode `${FirstName}`. The `$` means that this variable is editable by customers. The content inside the curly braces `{}` is case insensitive. The data collected here will be stored in your CRM (if you have set this up).



FIXED FIELD

Fixed field (most likely won't change once you've created a pass):
i.e. expiration date, label for 'points', venue, etc.

Simply type in the field name (i.e. Name)

LOCKSCREEN

Use the shortcode `%@` so that whenever content changes on the pass (i.e. points balance, promotion, etc.), your customers will see a message on their lock screen.

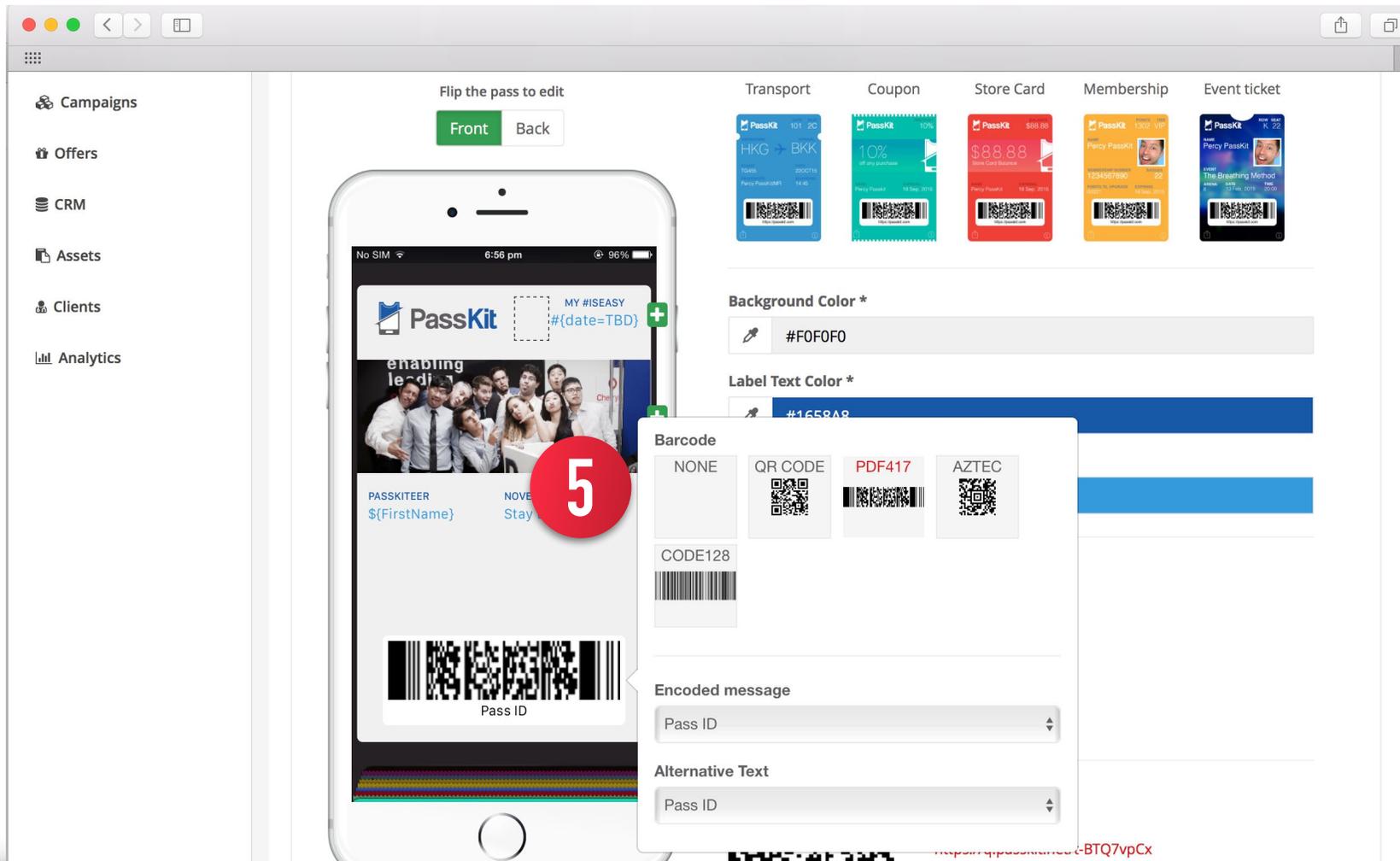
Examples:

1. You now have %@ points.
2. This week's special: %@
3. %@ (This will just show the entire text / value you have changed)



5. BARCODE

- Barcode types: choose a barcode type to use. CODE128 is a new feature in iOS9 which allows you to scan 1D barcodes. If you select CODE128 you will need a fallback 2D barcode for users not on iOS9.
- Encoded message: Leave this encoded with the Pass ID to enable redemption of that pass. The Pass ID is the unique identifier for that pass.
- Alternative message: This appears below the barcode.



[BACK]

Click on 'Back' to flip to the back of the pass and add additional content.

1. ADD AN APP

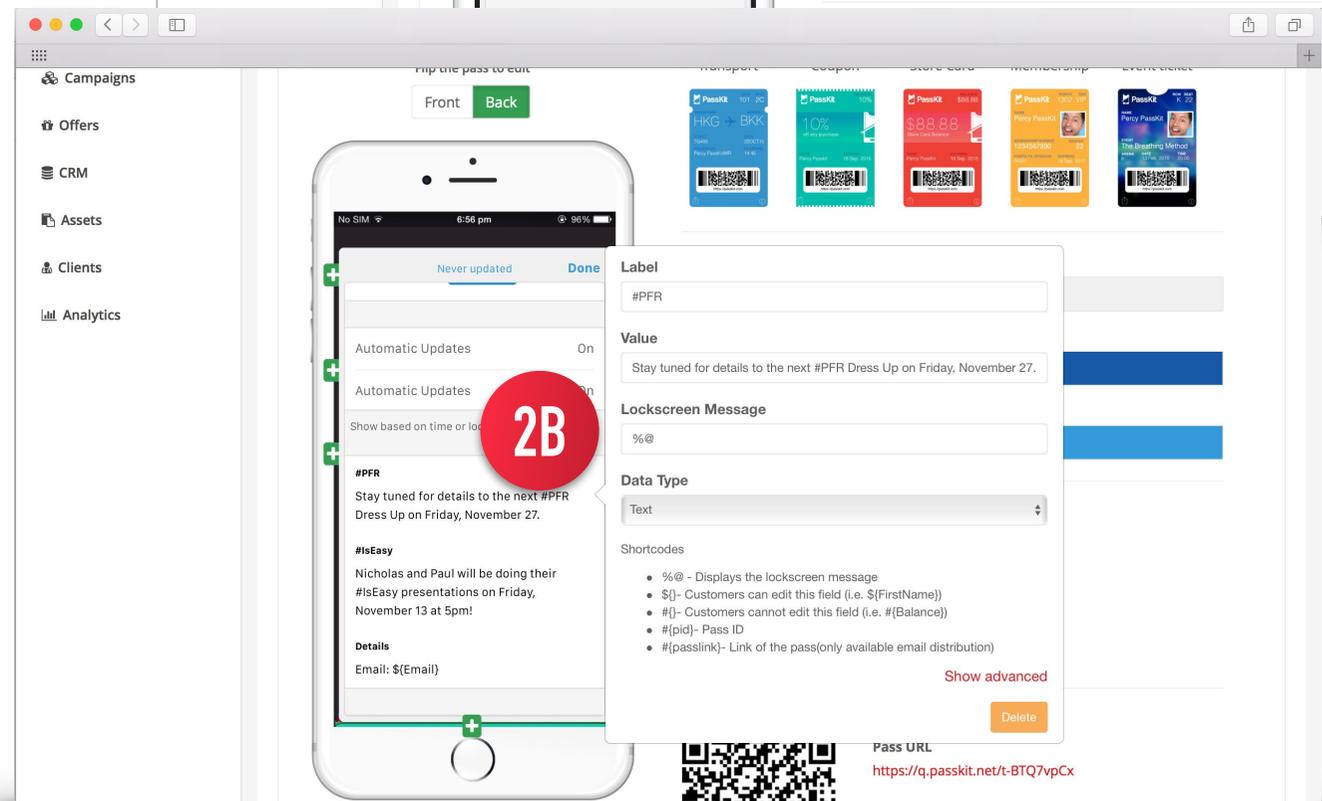
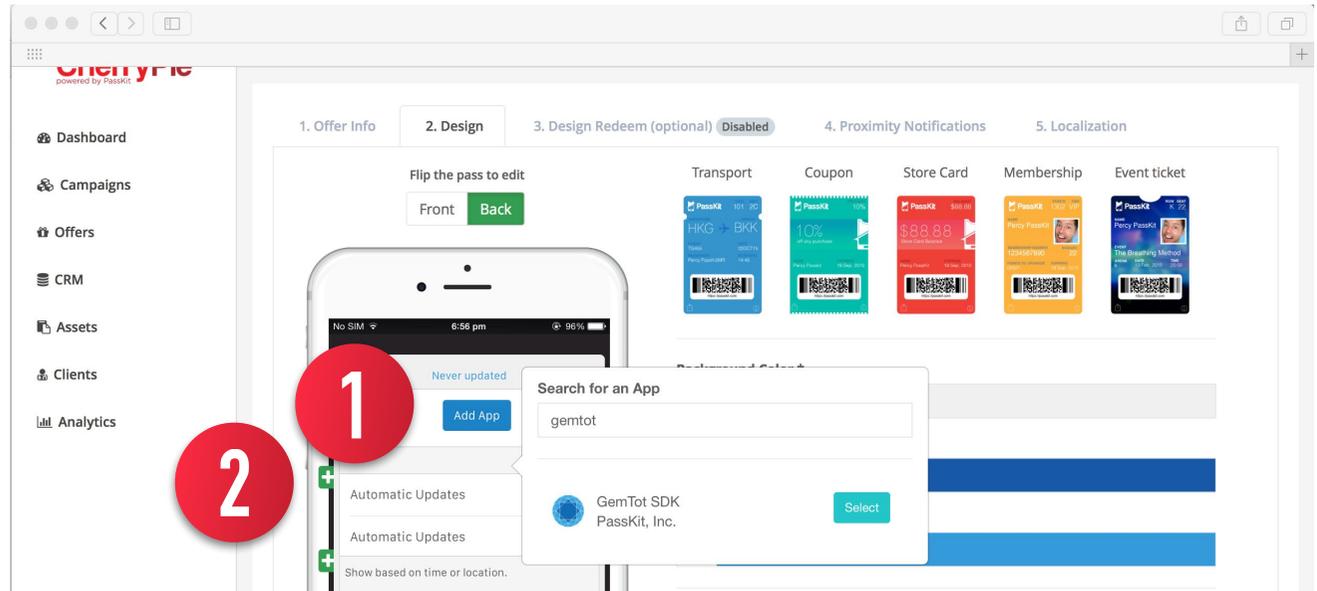
Add an App: Click on the 'Add App' button and search for a relevant app you want to add to the back of the pass. This is a great way to promote downloads of your app through passes.

2. TEXT

Text: Click on the green plus button to add text to the back of the pass.

a. HTML links: Use HTML to add hyperlinks to text like this `Click here` to visit our website.

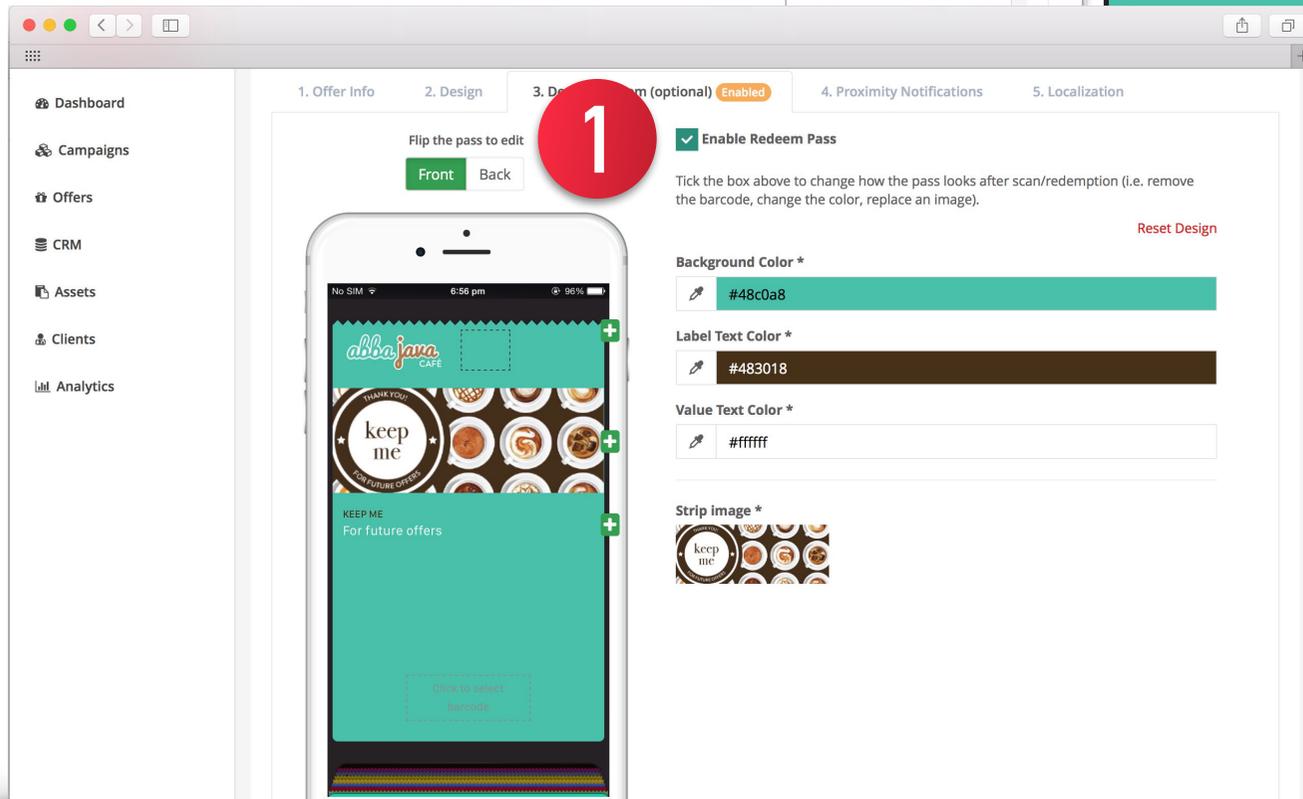
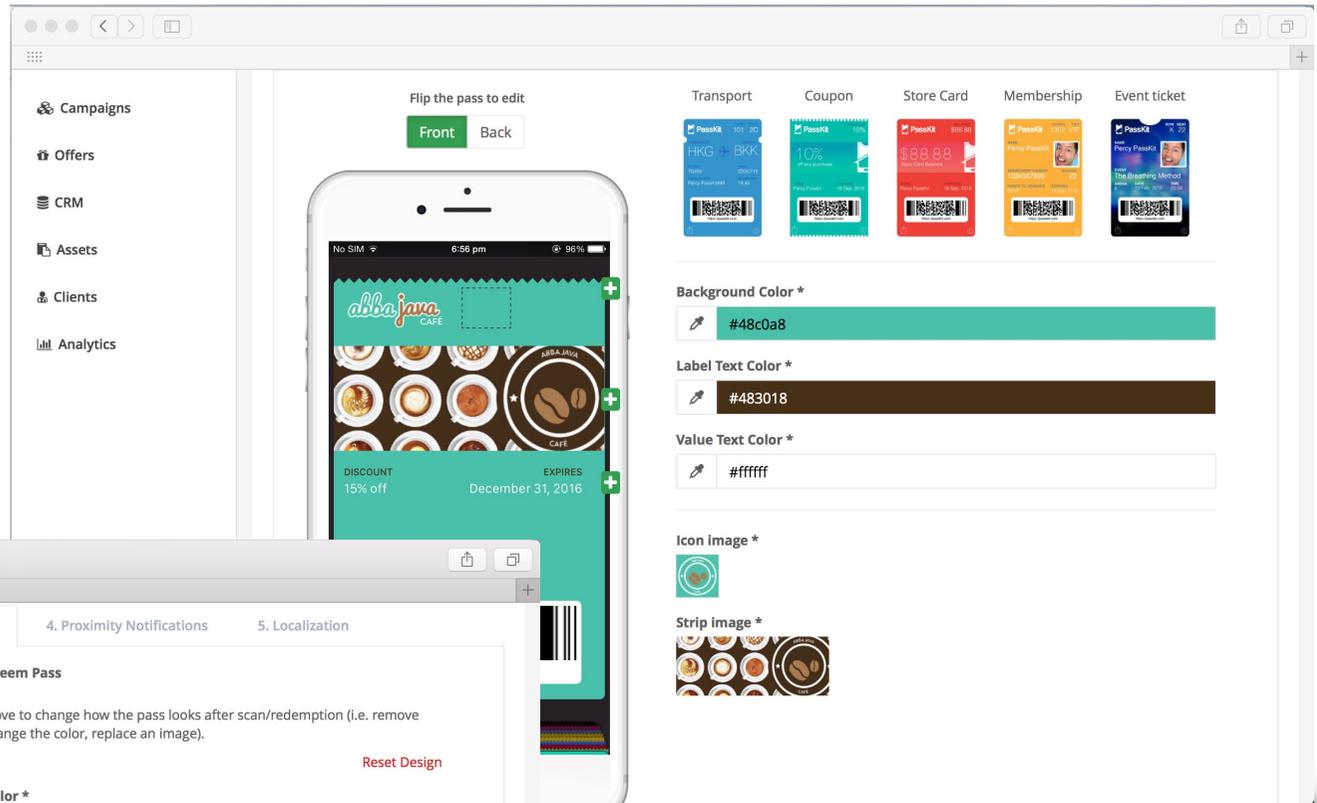
b. Lock screen message: Use the back of the pass to share promotions/news to your customers. Always add a `%@` to the lock screen message so that when you update that content, it will show up on the lock screen of the user's device.



5C: DESIGN REDEEM (OPTIONAL)

If you want to change the pass upon redemption, you can do so here. For example, removing the barcode, changing the color of the pass, replacing the image, adding content, etc.

1. Simply tick the 'Enable Redeem Pass' box to enable this function and you can tweak your design.



ORIGINAL DESIGN

DESIGN UPON REDEMPTION



5D PROXIMITY NOTIFICATIONS

Add up to 10 locations and 10 beacons to trigger location & proximity based lock screen messages.

1. LOCATIONS

Make sure you have already saved your location(s) under 'Assets → Locations'. Select the relevant location(s) and enter a relevant lock screen message to display when your customers are near that location (maximum 30 characters).

1

2

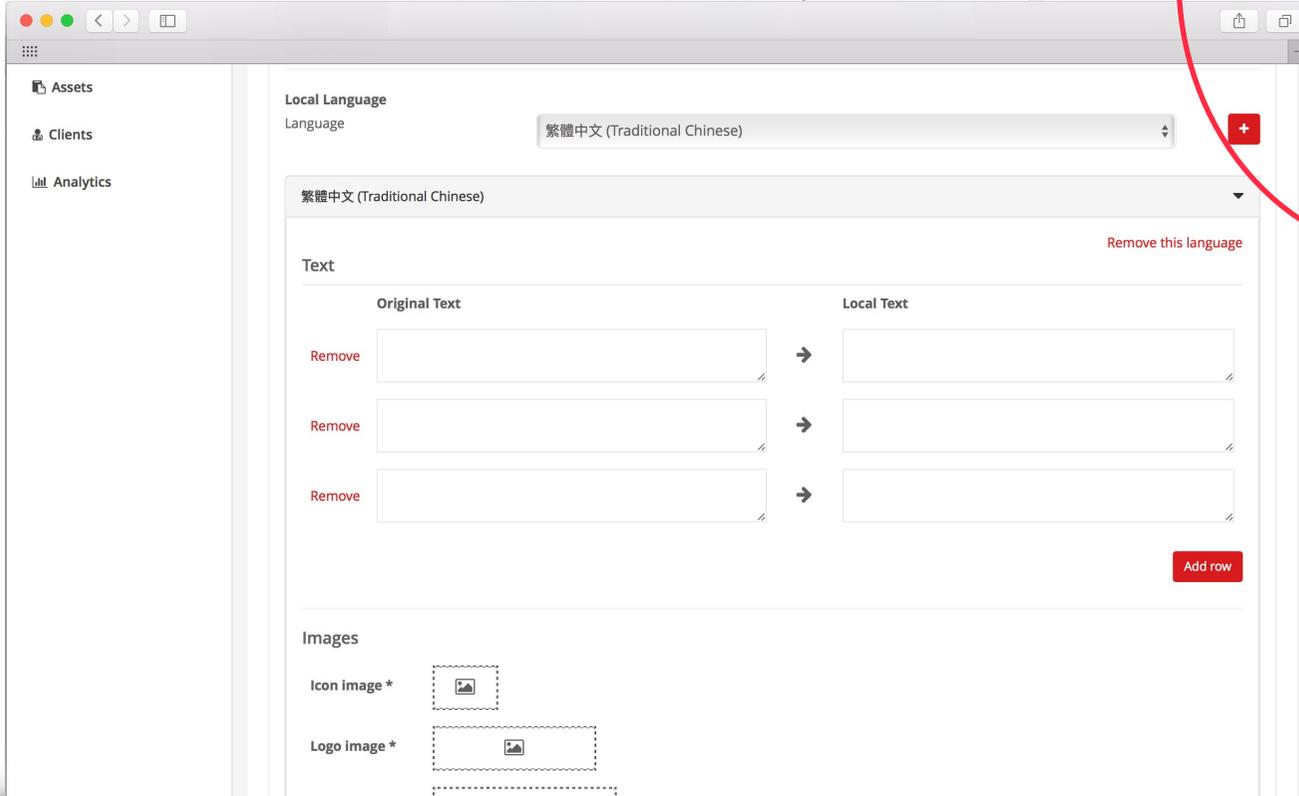
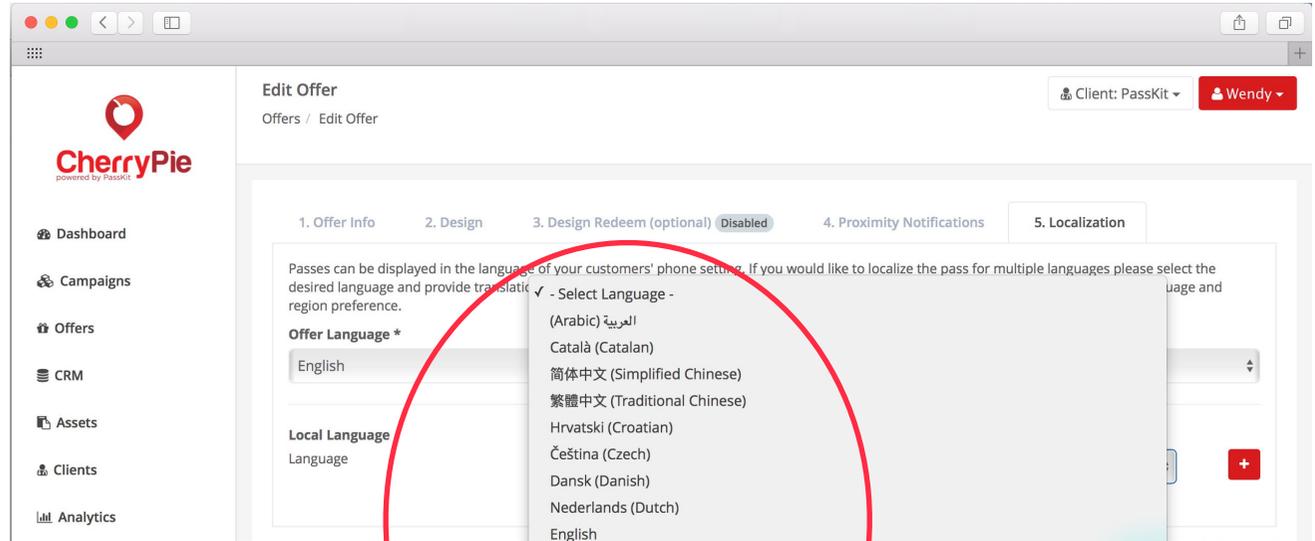
2. BEACONS

Make sure you have already saved your beacon(s) under 'Assets → Beacons'. Select the relevant beacon(s) and enter a relevant lock screen message to display when your customers are near that beacon (maximum 30 characters).



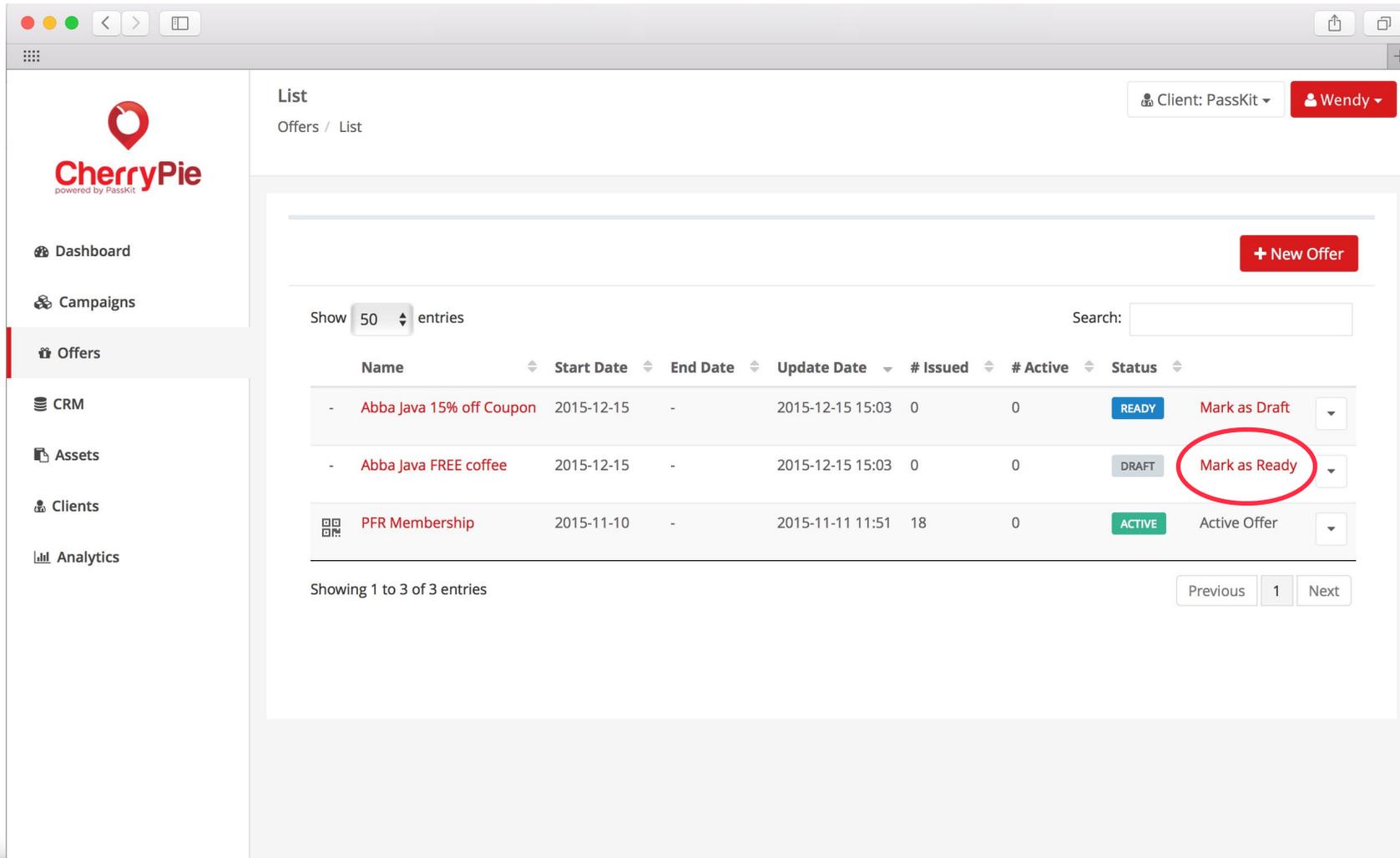
5E LOCALIZATION

Passes can be translated to display in the language of your customers' phone setting - text and even images. Add translations for up to 35 different languages.



5F SAVING & ACTIVATING YOUR TEMPLATE

Once you've filled in all the required fields, click on the 'Save' button to save this template. This will save the template in draft mode so that you can still go back and make changes. When you're happy with your design, click on 'Mark as Ready' so that you can add it to your campaign.



The screenshot displays the 'Offers / List' page in the CherryPie application. The interface includes a sidebar with navigation options: Dashboard, Campaigns, Offers (highlighted), CRM, Assets, Clients, and Analytics. The main content area shows a list of offers with the following data:

Name	Start Date	End Date	Update Date	# Issued	# Active	Status	Actions
- Abba Java 15% off Coupon	2015-12-15	-	2015-12-15 15:03	0	0	READY	Mark as Draft
- Abba Java FREE coffee	2015-12-15	-	2015-12-15 15:03	0	0	DRAFT	Mark as Ready
PFR Membership	2015-11-10	-	2015-11-11 11:51	18	0	ACTIVE	Active Offer

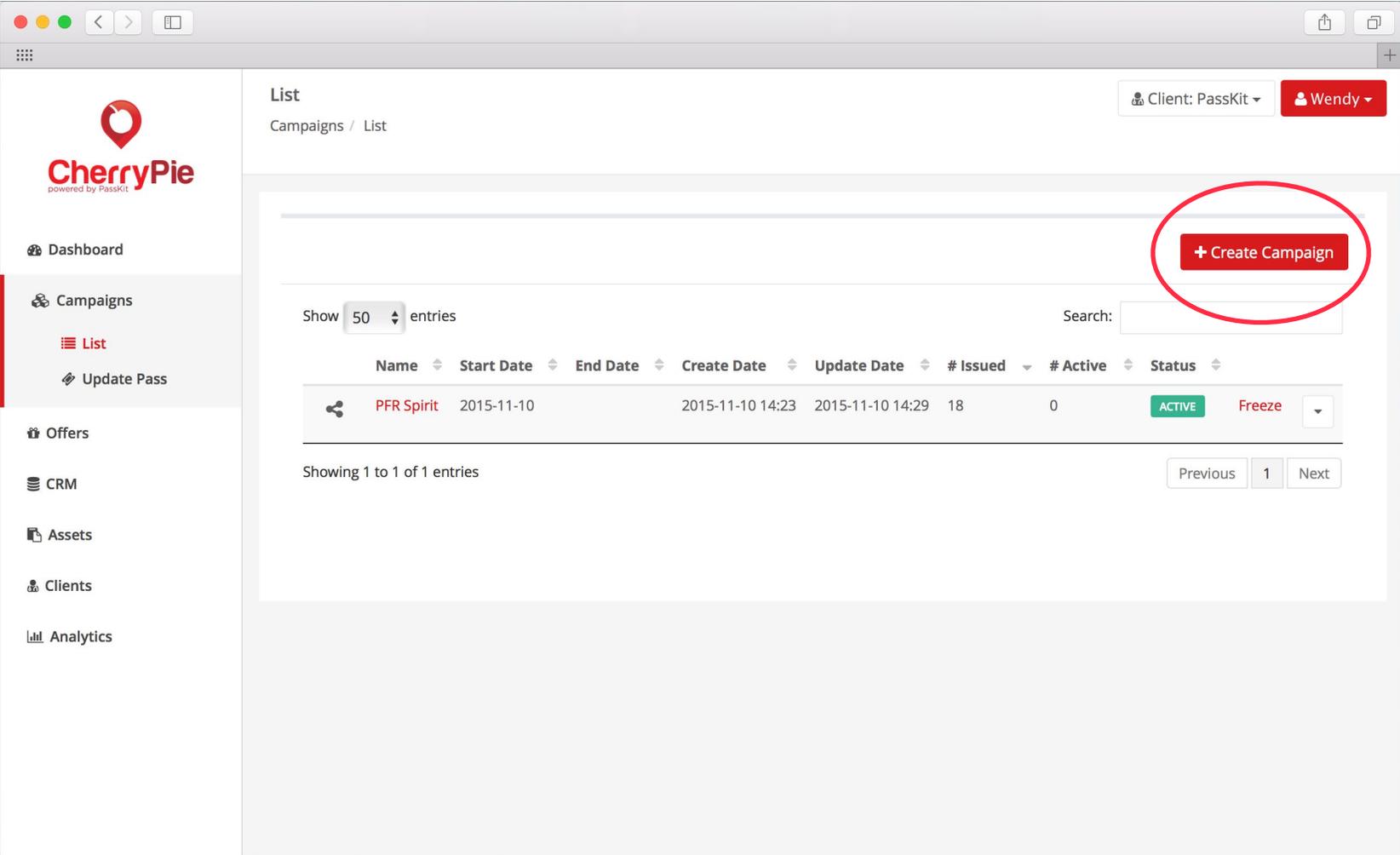
Additional interface elements include a '+ New Offer' button, a search bar, and pagination controls showing 'Showing 1 to 3 of 3 entries'.



6. CREATING CAMPAIGNS

Once you've created your templates, it's time to create and launch your campaign. The campaign section of CherryPie allows you to link multiple templates to the same campaign, set up automation rules, and instantly distribute your passes via email and SMS.

Go to Campaigns → List → Create Campaign



The screenshot displays the CherryPie web application interface. The left sidebar contains navigation links: Dashboard, Campaigns (selected), List (selected), Update Pass, Offers, CRM, Assets, Clients, and Analytics. The main content area is titled 'List' and shows a table of campaigns. A red circle highlights the '+ Create Campaign' button in the top right corner of the main content area. The table has columns for Name, Start Date, End Date, Create Date, Update Date, # Issued, # Active, and Status. The first entry is 'PFR Spirit' with a status of 'ACTIVE' and a 'Freeze' button.

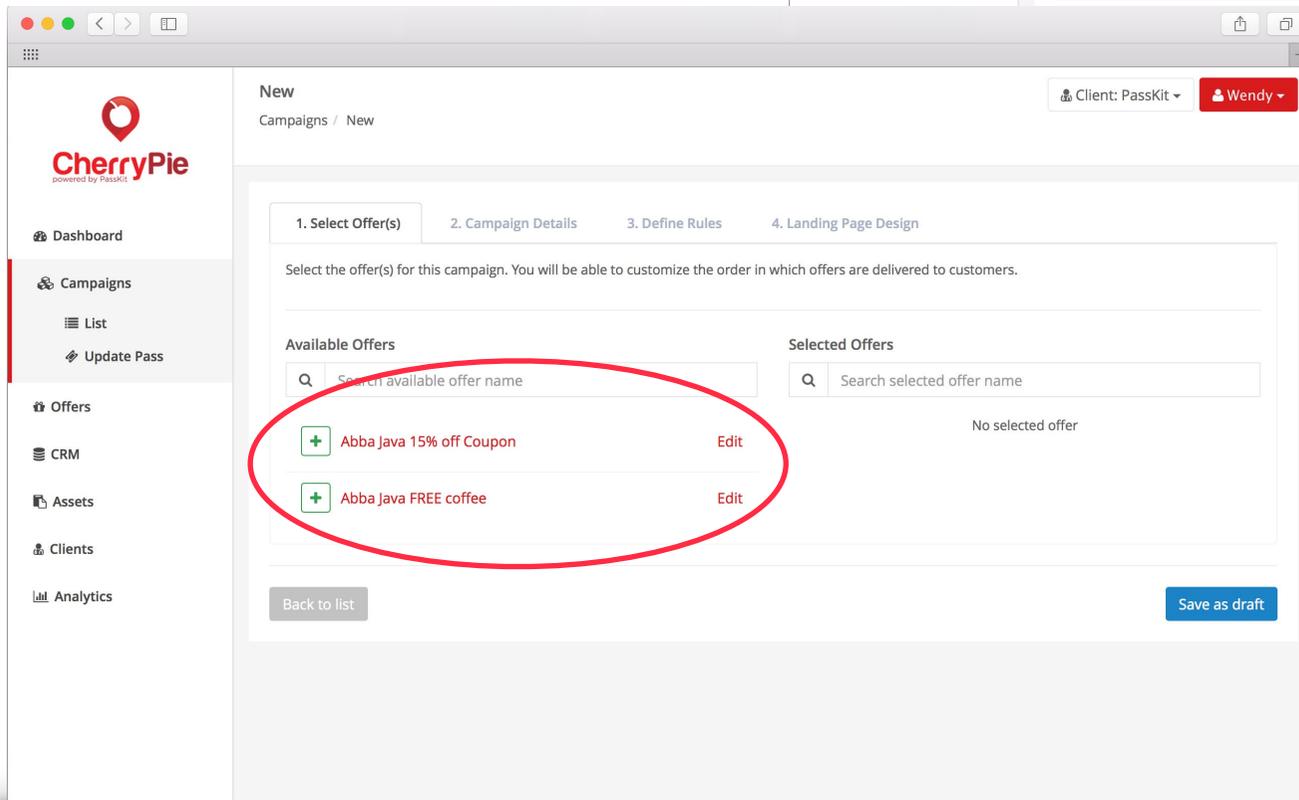
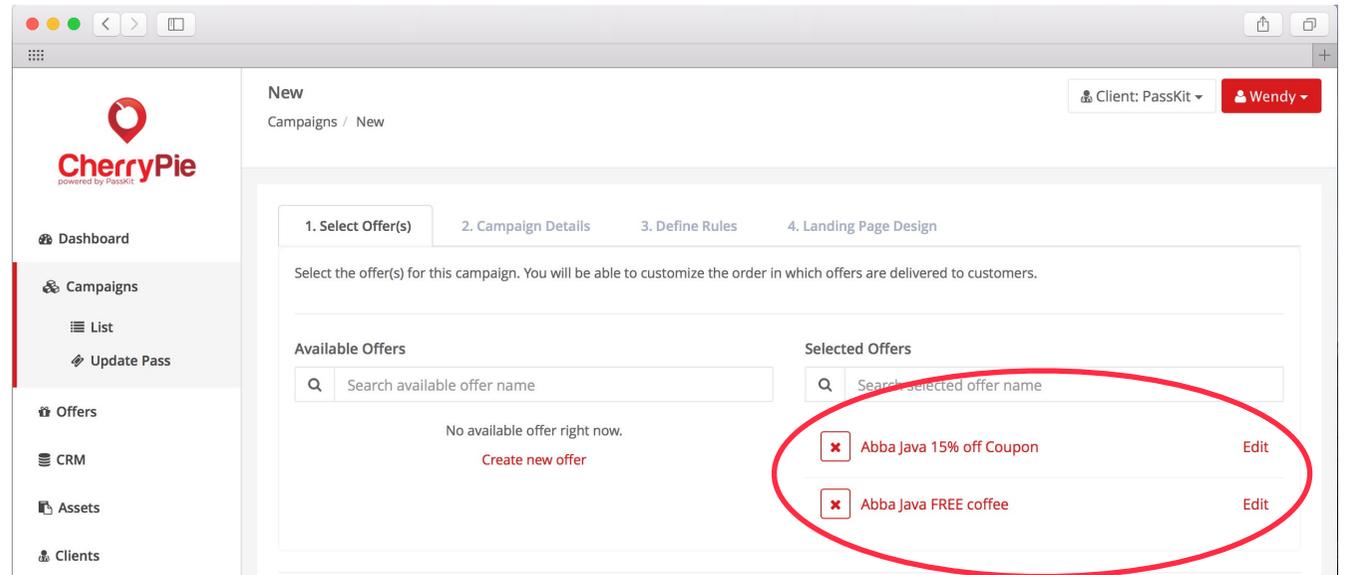
Name	Start Date	End Date	Create Date	Update Date	# Issued	# Active	Status
PFR Spirit	2015-11-10		2015-11-10 14:23	2015-11-10 14:29	18	0	ACTIVE Freeze



6A SELECT TEMPLATES

Select the templates you want to include in this campaign.

Note: You'll need to mark those templates as ready, otherwise it won't appear in the 'Available Templates' section. Each template can also only be used for 1 campaign.



6B CAMPAIGN DETAILS

1. Add in the relevant campaign name, description, start and end date (if applicable).
2. Select a certificate that you will use to sign this pass. See Section 3e for how to upload your own certificate.
3. Select a contact list you'd like customers to be added to for this campaign. The customer list is used to decide which list to add customers to when they add that pass to their mobile wallet (i.e. from a public link).

The screenshot shows the CherryPie web interface for creating a campaign. The left sidebar contains navigation options: Dashboard, Campaigns, Offers, CRM, Assets, Clients, and Analytics. The main content area is titled '2. Campaign Details' and includes a progress bar with four steps: 1. Select Offer(s), 2. Campaign Details, 3. Define Rules, and 4. Landing Page Design. The form fields are as follows:

- Name ***: Input field containing 'Abba Java Loyalty Coupon'. A red circle with the number '1' is overlaid on this field.
- Description ***: Input field containing 'Abba Java Loyalty Coupon'. A red circle with the number '2' is overlaid on this field.
- Start Date***: Calendar icon and input field containing '2015-12-15'.
- End Date**: Calendar icon and input field containing 'Optional'. A 'Reset Date' link is visible to the right.
- Certificate ***: Dropdown menu showing 'CherryPie1 (pass.com.passkit.cherrypie1)'. A 'Show Advanced' link is visible to the right.
- Add New Customer (optional)**: Dropdown menu showing '- Select Contact List -'. A red circle with the number '3' is overlaid on this field.

At the bottom of the form, there are two buttons: 'Back to list' and 'Save as draft'.



6C DEFINE RULES

This is where you can set up rules and link multiple templates together in one single campaign.

1. If you have more than one template, select which template you want to be distributed first.

2. Specify the event you want to happen when each template is redeemed. For example, push a new template after 15 seconds. **Note: if you have enabled the 'Redeemed State' in the 'Templates' section, your customers will first see the 'Redeemed State' design and then subsequently be pushed the new template.**

3. You can also choose to not push a new template by selecting 'No Action'. This will either trigger the 'Redeemed State' of the pass to appear if you set it up or the pass will stay static. **Note: You can still update content on the pass in the 'Templates' section.**

The screenshot displays the CherryPie interface for configuring rules. The left sidebar shows navigation options: Dashboard, Campaigns, Offers, CRM, Assets, Clients, and Analytics. A red circle with the number '1' highlights the 'Update Pass' option in the Campaigns menu.

The main content area is divided into two sections for rule configuration:

- Rules - Abba Java 15% off Coupon:** A table with columns 'When', 'Action', and 'After'. The first rule is configured with 'When' set to 'Redeem', 'Action' set to 'Push a New Offer' (highlighted with a red circle '2'), and 'After' set to '15 Second(s)'. Below the table, the offer 'Abba Java FREE coffee' is selected. A '+ Add Rule' button is visible at the bottom right.
- Rules - Abba Java FREE coffee:** A table with columns 'When', 'Action', and 'After'. The first rule is configured with 'When' set to 'Redeem', 'Action' set to 'No Action' (highlighted with a red circle '3'), and 'After' set to '-'. A '+ Add Rule' button is visible at the bottom right.

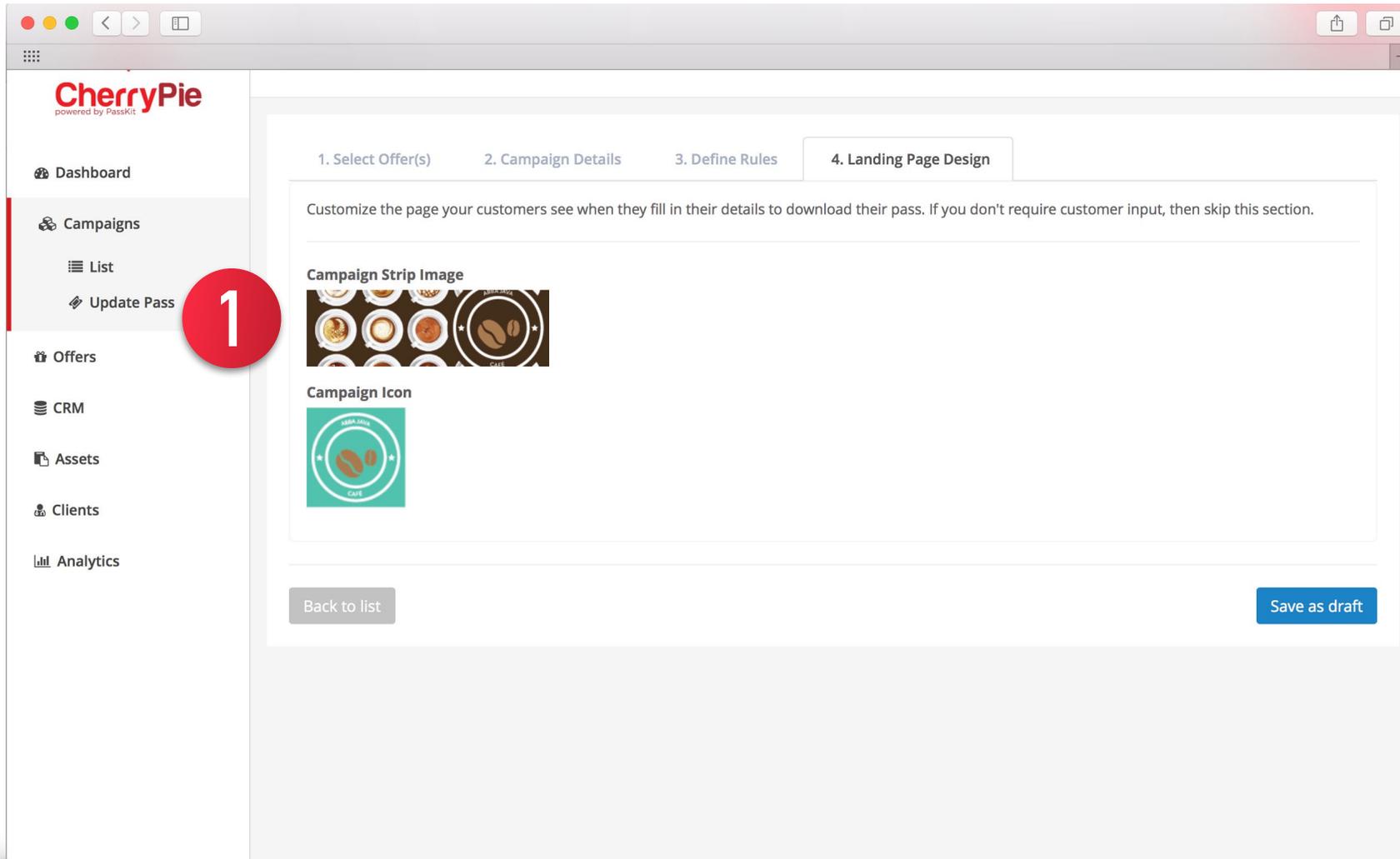
The top of the interface shows the 'Update Pass' section for the 'Abba Java 15% off Coupon' offer, with a dropdown menu for selecting the offer to be distributed first. The 'Abba Java 15% off Coupon' is selected.



6D LANDING PAGE DESIGN

If you require customers to enter information before downloading their pass, you can customize the look and feel of that landing page here. If you don't require any customer data, skip this.

1. Select a strip image and icon to appear on the page by selecting from the Image Library or uploading an image here.



The screenshot shows the CherryPie interface for customizing a landing page. The left sidebar contains navigation options: Dashboard, Campaigns (with sub-options List and Update Pass), Offers, CRM, Assets, Clients, and Analytics. The main content area is titled "4. Landing Page Design" and includes a "Campaign Strip Image" section with a grid of coffee-related images. A red circle with the number "1" is overlaid on the "Update Pass" option in the sidebar and the "Campaign Strip Image" section. Below the image grid is a "Campaign Icon" section with a single icon. At the bottom, there are "Back to list" and "Save as draft" buttons.



6E SAVING AND ACTIVATING YOUR CAMPAIGN

Save your campaign as a draft and when you're ready to activate the campaign, simply click on the 'Activate' link.

The screenshot shows the CherryPie dashboard interface. On the left is a sidebar with navigation options: Dashboard, Campaigns (with sub-options List and Update Pass), Offers, CRM, Assets, Clients, and Analytics. The main content area is titled 'List' and shows 'Campaigns / List'. At the top right, it displays 'Client: PassKit' and a user profile 'Wendy'. A '+ Create Campaign' button is visible. Below this, there's a 'Show 50 entries' dropdown and a search bar. A table lists two campaigns:

Name	Start Date	End Date	Create Date	Update Date	# Issued	# Active	Status	
PFR Spirit	2015-11-10		2015-11-10 14:23	2015-11-10 14:29	18	0	ACTIVE	Freeze
- Abba Java Loyalty Cou...	2015-12-15		2015-12-15 15:43	2015-12-15 15:43	0	0	DRAFT	Activate

At the bottom, it says 'Showing 1 to 2 of 2 entries' with 'Previous', '1', and 'Next' navigation buttons.



7. DISTRIBUTING CAMPAIGNS

Activate your campaign and click on the 'Share icon' right next to the campaign name. This will open up the 'Distribution' box where you can access the pass URL and send the campaign via email.

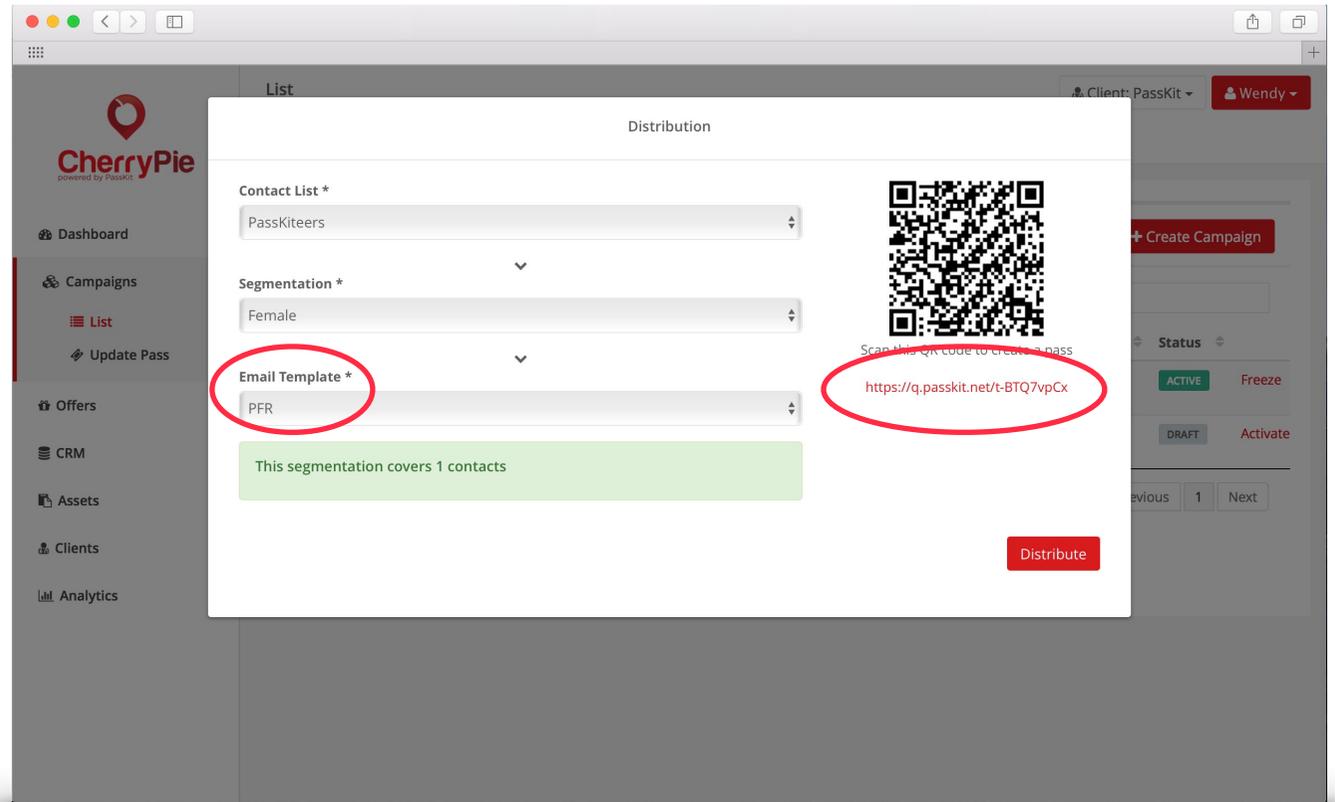
Distribute the pass URL

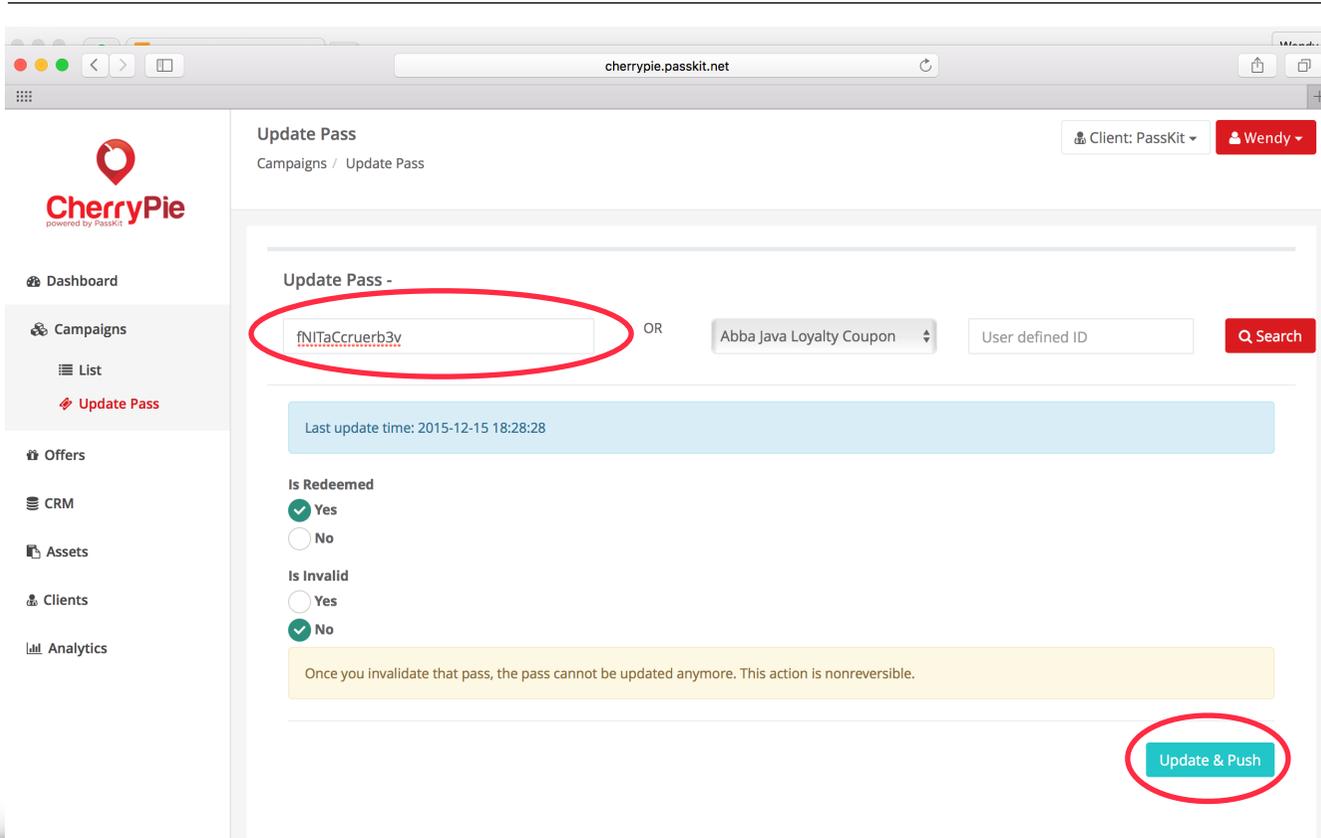
Access the pass URL here and promote your campaign on social media, online, websites, printed on posters, in-store, and more. Simply copy and paste this URL and share it online, or embed the URL in a QR code (ideal for sharing on tent cards/posters).

Distribute via Email

You can also send this campaign to your contacts in your contact list(s). If you have created segmentations for that contact list, you can also choose to only send this campaign to a specific segment.

Simply select a contact list, select segmentation (if applicable), and select the email template you have created. Make sure that you have included the pass URL in the email using the shortcode `{passlink}`, otherwise your customers won't be able to access the pass URL.





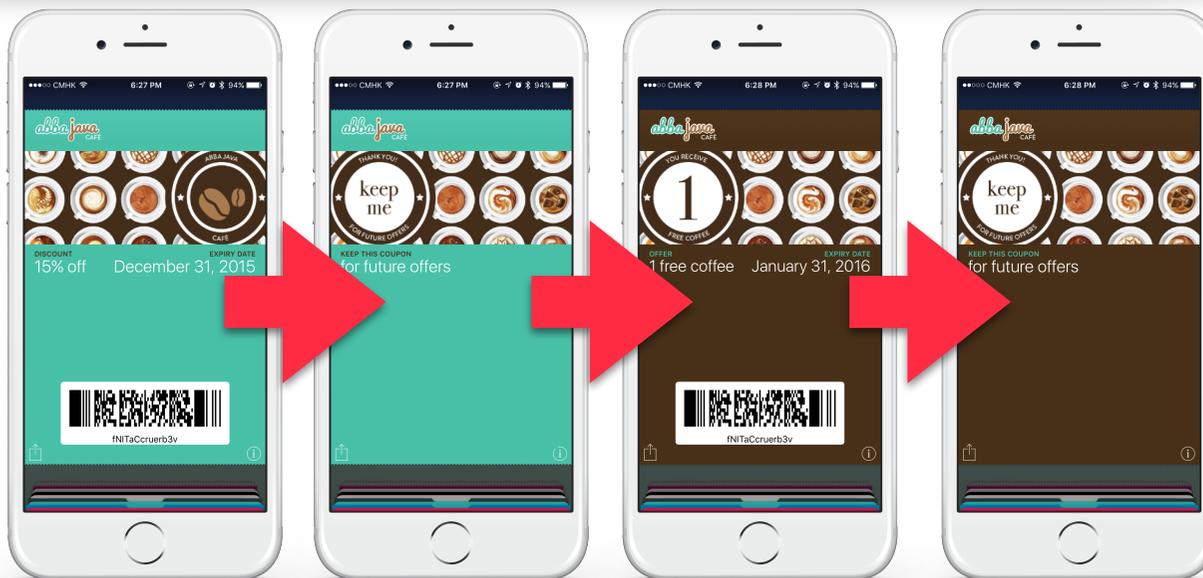
8. UPDATING PASSES

Remotely via CherryPie

Redeem passes, change a variable field, or invalidate a pass remotely - without any other tools. Simply select the campaign you want to update and enter the pass ID or user defined ID. By default, the encoded message in the barcode of the pass is the pass ID, so use this if you haven't changed it. If you've set up your contact lists correctly, you'll be able to see the pass ID for a specific contact.

Select the campaign → enter in pass ID or user defined ID → search

You can redeem the pass, invalidate it, or change a variable field (must have already been set up in the 'Templates'). Then click on 'Update & Push' to update the pass.



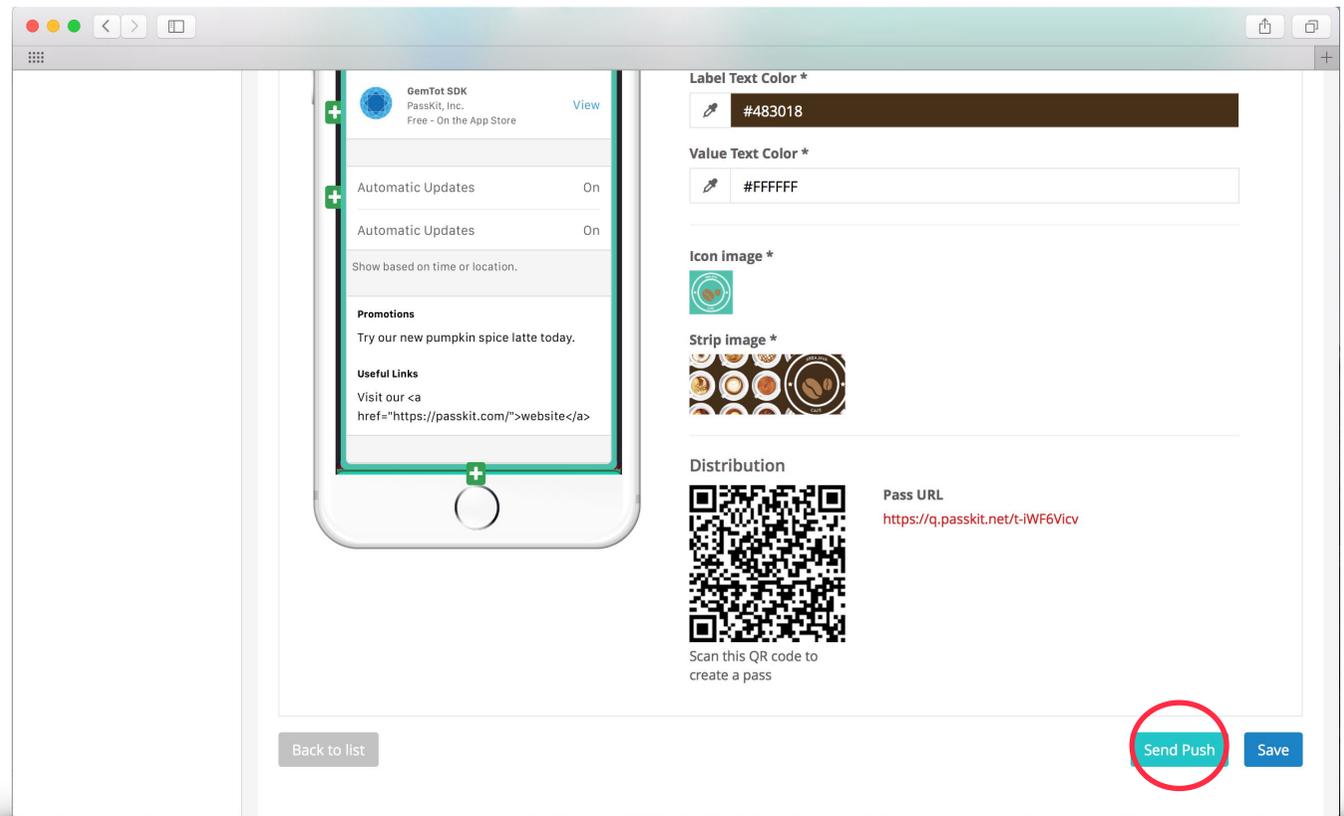
9. CHANGING CONTENT ON TEMPLATES & SENDING NOTIFICATIONS

Once your campaign is activated, you can go back to your template in the 'Templates' tab and change the content on it (i.e. promotions, news, etc.).

Go to Templates —> Select your Template

Make any changes in design or content to your template and click 'Save' and 'Send Push' to push the changes to all contacts who have that template installed.

Note: For contacts to see a lock screen message, you would have needed to add a %@ to the lock screen message section prior to distributing your campaign.



SHORTCODES

%@ - Displays the lockscreen message

\${}- Customers can edit this field (i.e. \${FirstName})

#{}- Customers cannot edit this field (i.e. #{Balance})

#{pid}- Pass ID

#{passlink}- Link of the pass(only available email distribution)

