3. Create pURLs & QR codes (https://focus.laserimagenc.com/gather-purl-qr-
   data/) (input the CSV file from Step 2).

4. Create a contact table in Focus (use the "...-purls.csv" output file from Step 3).

5. Insert the table from Step 4 into an accordion item.

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Code notes

Scripts (PHP, Javascript, & CSS)

- Global
  - https://focus.laserimagenc.com/focus/wp-content/themes/bb-theme-
    child/functions.php
    - always load
      - focus.laserimagenc.com/focus/wp-content/focus/global/global.php
      - focus.laserimagenc.com/focus/wp-content/focus/global/global.js
      - focus.laserimagenc.com/focus/wp-content/focus/global/global.css
- Create pURLs & QR codes
  - only load for https://focus.laserimagenc.com/gather-purl-qr-data/
    (https://focus.laserimagenc.com/gather-purl-qr-data/)
    - focus.laserimagenc.com/focus/wp-content/focus/tools/gather-purl-qr-
      data.php
    - focus.laserimagenc.com/focus/wp-content/focus/tools/gather-purl-qr-
      data.js
    - focus.laserimagenc.com/focus/wp-content/focus/tools/gather-purl-qr-
      data.css
  - only load for https://focus.laserimagenc.com/gather-purl-qr-data/
    (https://focus.laserimagenc.com/gather-purl-qr-data/)
    - focus.laserimagenc.com/focus/wp-content/focus/tools/create-purls-qr-
      codes.php

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- focus.laserimagenc.com/focus/wp-content/focus/tools/create-purls-qr-codes.js
- focus.laserimagenc.com/focus/wp-content/focus/tools/create-purls-qr-codes.css
- Dashboard
  - only load for https://focus.laserimagenc.com/12-touch-dashboard/ (https://focus.laserimagenc.com/12-touch-dashboard/)
    - focus.laserimagenc.com/focus/wp-content/focus/12-touch/dashboard.php
    - focus.laserimagenc.com/focus/wp-content/focus/12-touch/dashboard.js
    - focus.laserimagenc.com/focus/wp-content/focus/12-touch/dashboard.css
- Landing page (step 1 of 2)
  - only load for https://focus.laserimagenc.com/12-touch-landing/ (https://focus.laserimagenc.com/12-touch-landing/)
    - focus.laserimagenc.com/focus/wp-content/focus/12-touch/landing.php
    - focus.laserimagenc.com/focus/wp-content/focus/12-touch/landing.js
    - focus.laserimagenc.com/focus/wp-content/focus/12-touch/landing.css
- Landing page (step 2 of 2)
  - only load for https://focus.laserimagenc.com/12-touch-purchase-gyft-card/ (https://focus.laserimagenc.com/12-touch-purchase-gyft-card/)
    - focus.laserimagenc.com/focus/wp-content/focus/12-touch/purchase-gyft-card.php
    - focus.laserimagenc.com/focus/wp-content/focus/12-touch/purchase-gyft-card.php
    - focus.laserimagenc.com/focus/wp-content/focus/12-touch/purchase-gyft-card.php

Dashboard page

https://focus.laserimagenc.com/12-touch-dashboard/ (https://focus.laserimagenc.com/12-touch-dashboard/)

- before page loads
  - /wp-content/themes/bb-theme-child/functions.php runs

- runs PHP function "loadScripts"
  - runs /wp-content/focus/12-touch/global.php
  - includes /wp-content/focus/12-touch/global.js
  - includes /wp-content/focus/12-touch/global.css
  - runs /wp-content/focus/12-touch/dashboard.php
  - includes /wp-content/focus/12-touch/dashboard.js
  - includes /wp-content/focus/12-touch/dashboard.css

- when table row in accordion is clicked

  - run JS function "tableRowSelected"
  - create/update Drip subscriber
  - if Drip subscriber already exists, status is displayed

- when "Gravity Form ID #6" is submitted

  - (Start -> Update)
  - plugin "Email Marketing by Drip" updates Drip Subscriber
  - based on form value selected, Drip custom field "touch_role" is updated & automation workflow fires
    - 12 Touch Stop
    - 12 Touch Suspect
    - 12 Touch Prospect
    - 12 Touch Customer

Landing page (Step 1 of 2)

https://focus.laserimagenc.com/12-touch-landing/ (https://focus.laserimagenc.com/12-touch-landing/)

- Demo - refer to Demo section on this page

- before page loads

  - /wp-content/themes/bb-theme-child/functions.php runs
    - runs PHP function "loadScripts"
      - runs /wp-content/focus/12-touch/global.php
        - set global variables
          - check - was &key passed as a query parameter?   ︿

- if yes - define production Gyft credentials
  - display "." in the upper left portion of the page
- in no, define sandbox Gyft credentials
  - display "test" in the upper left portion of the page
- includes /wp-content/focus/12-touch/global.js
  - create JS event handler loop
- includes /wp-content/focus/12-touch/global.css
- runs /wp-content/focus/12-touch/landing.php
  - set global variables
    - run PHP function "get_drip_subscriber" to get info from Drip
      - need suspect's sales rep to include proper signature while building page
  - define shortcode "securityCheck"
  - define shortcode "addSalesRepSignature"
  - define shortcode "addWelcomeVideo"
  - define shortcode "addSalesRepCalendar"
  - define shortcode "GyftRetailers"
- includes /wp-content/focus/12-touch/landing.js
- includes /wp-content/focus/12-touch/landing.css

- when page builds (PHP)

  - run PHP short code "securityCheck" at top of page
    - runs PHP function "check_parameters" (since page can purchase a gift card, restrict who can access the page)
      - compare query string parameters (passed in with long URL which was a redirect from the short pURL) to same info retrieved from Drip & saved in $GLOBALS['focus_drip_key'] while building page
        - if security code does NOT match
          - insert JS call "destroyPage()" on page
            - when HTML loads, JS function "destroyPage()" replaces the page with an error message
  - display HTML page section (note)
  - run PHP short code "addSalesRepSignature"

- - - runs PHP function "<u>add_sales_rep_signature</u>"
      - insert sales rep signature after welcome note
  - display HTML page section (Watch a quick video)
  - run PHP short code "<u>addWelcomeVideo</u>"
    - runs PHP function "<u>add_welcome_video</u>"
      - insert sales rep video - unique for each suspect
  - display HTML page section (Pick a day & time to meet)
  - run PHP short code "<u>addSalesRepCalendar</u>"
    - runs PHP function "<u>add_sales_rep_calendar</u>"
      - insert sales rep Calendly embed code
  - display HTML page section (Answer two questions)
  - display "Gravity Form ID #8" (12 Touch - Landing page - Main form)
  - insert message & HTML accordion (initially closed)
    - both are initially hidden
  - run PHP shortcode "<u>GyftRetailers</u>" in accordion
    - runs PHP function "<u>create_Gyft_cards</u>"
      - runs PHP function "<u>list_gift_retailers</u>"
        - query Gyft API for ALL retailers - no way to filter)
      - build shorter list of gift cards choices with value of $15
  - display HIDDEN "Gravity Form ID #9" (12 Touch - Landing page - Reward form)

- **when page loads (JS)**

  - JS event handler loop
    - if first page load, retrieve subscriber info from Drip API using email query string parameter (need the sales rep)
      - if Drip API call is successful, run JS function "<u>getDripSubscriberLandingFirstLoadSuccess</u>"
        - copy sales rep from Drip info to "Gravity Form ID #8"
        - copy subscriber first name from Drip into HTML fields
    - watch for & act on events
      - video clicked (watched)
      - Gyft card clicked (selected)
        - run JS function "<u>selectShopCard</u>"

- copy selected Gyft retailer & retailer ID to "Gravity Form ID #9"
- close the selection accordion (which contains the Gyft card choices)
- reset accordian (used for holding list of Gyft card retailers
- "Gravity Form ID #8" submit button clicked
    - check landing page tasks - video clicked? meeting set? questions answered?
        - jQuery runs JS function "landingPageCheckTasks"
            - "event.stopPropagation()" prevents form from being submitted (& recording an entry)
            - if (landingPageVideoTask == false) - display error message & stop
            - run JS function "landingPageQuestionTask"
                - if challenge field in Gravity Form ID #8 (main form) is empty - display error message & stop
                - if ("landingPageQuestionTask" == true), then run JS function "landingPageMeetingTask"
                    - retrieve Drip data, if success - run JS function "getDripSubscriberSuccess"
                        - does results.custom_fields["touch_meeting"] exist?
                            - if a meeting was set, then Calendly runs a webhook which calls ".../focus/12-touch/calendly-drip-web-hook.php" which updates Drip
                            - if yes
                                - hide 4 HTML page sections (note, video, Calendly, challenge -main form)
                                - show message, HTML accordion (initially closed)

& rewards form (Gravity Form ID #9)

- if permission box was left selected, change field value from checked to date/time stamp (we need a date/time stamp in Drip to verify permission, not a boolean yes/no)
- copy permission & challenge to "Gravity Form ID #9"
  - "Gravity Form ID #8" does not submit, does NOT create an entry, it only gathers info which is copied to "Gravity Form ID #9" which DOES submit & create a form entry for "Gravity Form ID #9"
- if no - display error message & stop
- "Gravity Form ID #9" submit button clicked
  - run JS function "landingPageBuyCard"
    - is gravity form filled in (retailer selected)?
      - if no - display error message & stop
  - form entry is created
  - form confirmation redirects to "...12-touch-purchase-gyft-card/?entryID={}&key={}

Landing page (Step 2 of 2)

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https://focus.laserimagenc.com/12-touch-purchase-gyft-card/ (https://focus.laserimagenc.com/12-touch-purchase-gyft-card/)

- before page loads

  - /wp-content/themes/bb-theme-child/functions.php runs
    - runs PHP function "loadScripts"
      - runs /wp-content/focus/12-touch/global.php
        - set global variables
          - check - was &key passed as a query parameter?
            - if yes - define production Gyft credentials
              - display "." in the upper left portion of the page
            - in no, define sandbox Gyft credentials
              - display "test" in the upper left portion of the page
      - includes /wp-content/focus/12-touch/global.js
      - includes /wp-content/focus/12-touch/global.css
      - runs /wp-content/focus/12-touch/purchase-gyft-card.php
        - define shortcode "purchaseSelectedGyftCard"
      - includes /wp-content/focus/12-touch/purchase-gyft-card.js
      - includes /wp-content/focus/12-touch/purchase-gyft-card.css

- when page builds (PHP)

  - run PHP short code "purchaseSelectedGyftCard"
    - runs PHP function "purchase_Selected_Gyft_card"
      - runs PHP function "purchase_gyft_card"
        - retrieve values from form entry for "Gravity Form ID #9"
          - if form entry was created > 1 minute ago, die - the page is being hacked
        - runs PHP function "get_drip_subscriber"
          - check Drip to make sure a card has not already been issued
            - subscriber custom field "touch_gyftCardConfirmationID" should not exist
              - if custom field exists, display error message & die   ︿

- retrieve values from form entry for "Gravity Form ID #9", pass to PHP function "purchase_gyft_card"
- runs PHP function "purchase_gyft_card"
  - POST to Gyft API
- set values for Drip subscriber custom fields, pass to PHP function "update_drip_subscriber"
  - **** this includes defining "touch_role" to "Prospect"** (previously has been "Suspect")
- runs PHP function "update_drip_subscriber"
  - when custom field "touch_role" is updated (from "Suspect" to "Prospect"), the Drip "12 Touch Prospect" automation workflow will be triggered, which sends a confirmation email to new prospect as well as an update to the prospect's sales rep.
- displays confirmation message

- when page loads (JS)

  - no code

Calendly web hook

- https://focus.laserimagenc.com/wp-content/focus/lipm-common/calendly-readme.html (https://focus.laserimagenc.com/wp-content/focus/lipm-common/calendly-readme.html)
- manually create a Calendly webhook for each sales rep account (see https://developer.calendly.com/docs/)
  - created (4) webhooks - (1) for each sales rep
  - I used the app - Postman for Mac - to interact with the Calendly API
  - Calendly requires a unique URL for each webhook, the same URL cannot be used for multiple webhooks
    - however, by appending a query parameter at the end of the URL (?rep=candy@laserimagenc.com or ?rep=mike@laserimagenc.com ...) a unique URL is formed, so the SAME php page ("calendly-drip-web-hook.php") can be used for ALL webhooks.

- when an appointment is made (via the embed code on the landing page), a Calendly webhook calls "https://focus.laserimagenc.com/wp-content/focus/lipm-common/calendly-drip-web-hook.php" using POST (this page is not controlled by WordPress, it is a standalone PHP page)
  - require ".../focus/global/global.php"
  - retrieve the POST data (in JSON format) & decode it
    - "payload->invitee->email" (used as key to update Drip subscriber)
    - "invitee->created_at" time/date stamp (used to update Drip, prove suspect has completed the "schedule meeting" task
    - "payload->event_type->slug" (set as $indicator - used to look for string "focus-" set up in "Event Link" in calendly)
  - does ($indicator == 'focus-')?
    - if yes
      - run PHP function "update_drip_subscriber"
      - update Drip "touch_meeting" custom field with "invitee->created_at" time/date stamp
    - if no - exit

Calendly notes

- in the Calendly cloud app, manually create a new Calendly event.
  - it SHOULD be named "Schedule 30 minutes for XXX to stop by" so it looks appropriate on the landing page
  - the Event Link MUST begin with "focus-" (e.g. "focus--meet-greet-for-30-minutes")
    - unfortunately Calendy uses only one webhook (.../focus/lipm-common/calendly-drip-web-hook.php) per account and it fires for _all_ Calendly events, so we need to respond & update the Drip subscriber for ONLY "focus-" events & ignore all others
    - this is so will _only_ update a Drip subscriber for "focus-" events.
- the embed code for the landing page event is stored in .../focus/lipm-common/landing.php & displayed when the landing page builds

Drip notes

- **Subscriber saved segments**

  - Candy Puryear - custom fields "sales_rep" equals "candy@laserimagenc.com"
  - Mike Dickinson - custom fields "sales_rep" equals "miked@laserimagenc.com"
  - Mike Mitchell - custom fields "sales_rep" equals "mike@laserimagenc.com"
  - Doug Foster - custom fields "sales_rep" equals "doug@laserimagenc.com"

- **Subscriber custom fields**

  If a PHP or JS function creates a NEW (as in first time EVER created or used) custom field for a subscriber, make sure to manually go to Drip -> Subscribers -> Custom Fields and check the box "Make field public via API." If you fail to do this, the specific custom field will not be returned by call to the API. Unfortunately, NEW custom fields are no by default exposed by the API.

  - company - set by JS subscriber update/add on Dashboard page
  - first_name - ditto
  - last_name - ditto
  - sales_rep - ditto (email: e.g. candy@laserimagenc.com, miked@laserimagenc.com, ...)
  - touch_pURL - ditto (pURL)
  - touch_qrURL - ditto (URL to QR code)
  - touch_role - ditto (Suspect, Prospect, Customer, or Stop)
  - permission_granted - set by submitting Gravity Form ID #9 on Landing page (permission to add to contact list)
  - touch_challenge - ditto (question to suspect - "What is the one biggest challenge ... ?"
  - touch_meeting - date/time stamp when Calendly appointment was set up (created by Web hook listener "CalendlyDripWebHook.php")
  - touch_gyftCardRetailer - selected on Landing page, set by PHP shortcode on "12-touch-purchase-gyft-card" page (selected retailer)
  - touch_gyftCardID - ditto (Gyft ID for specific card)
  - touch_gyftCardConfirmationID - set by PHP shortcode on "12-touch-purchase-gyft-card" page (purchase card confirmation ID)
  - touch_gyftCardConfirmationURL - set by PHP shortcode on "12-touch-purchase-gyft-card" page (purchase card confirmation URL)

- o permission_withdrawn - not used yet

- Campaigns

  - o 12 Touch Suspect - Doug F
  - o 12 Touch Suspect - Mike D
  - o 12 Touch Suspect - Mike M
  - o 12 Touch Suspect - Candy P
  - o 12 Touch Prospect - Doug F

- Automation Workflows

  - o 12 Touch Suspect
    - when the "touch_role" custom field is updated
      - determine which segment subscriber is in (Candy Puryear, Doug Foster, Mike Dickinson, Mike Mitchell)
        - send notification email to sales rep
        - restart campaign (e.g. "12 Touch Suspect - Doug F")
  - o 12 Touch Prospect
  - o 12 Touch Customer
  - o 12 Touch Stop

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Post-campaign review

Assess the campaign. Were objectives & goals met, were expenses under budget? What best practices did we learn from the campaign? Were there lessons learned, things we would do different next time? Was the campaign plan on target? Were the elements effective? Should we make changes to the landing page (or Drip campaign emails if used) for future campaigns? Did we see any immediate revenue as a result of the sales calls. Did we encounter any objections we couldn't address during the followup sales calls. Did we get any quotes for testimonials?

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