Beacon Set-Up & Management

2017 - Fall Edition

User Guide - Table of Contents

Overview

Beacons are inconspicuous devices placed in designated locations in a Club or on a Club's Golf Course that transmit small amounts of data via Bluetooth Low Energy (BLE) up to 150 feet, that can be read by a Club's Mobile App, and translated into an actionable message to either a Member, or a Staff Member.

Use Case

For instance, a beacon placed at the entrance of the Dining Room, could automatically trigger a message to the General Manager when a Member with a birthday, or even an overdue balance has entered the room.

Or, a Beacon placed at the entrance of the Club could send a Welcome message to all Members and alert the General Manager of the Club when certain Members (perhaps Board Members) are on-site.
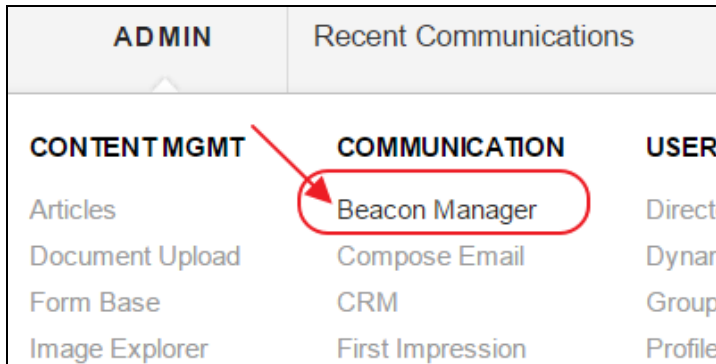
Beacons

When Beacons are initially set up for a Club, Clubessential encrypts the Beacons each with a unique identifier, and assigns a defined range to the beacon as to how far the beacon will transmit its bluetooth signal (based on info gathered from the Club). This is measured in decibels, however, has been translated into approximate distances for ease of reference (i.e. short range - (20ft or less), medium range (20 - 70ft), and long range (70 - 150ft). Note this distance translation is an approximation and is also relative, based on factors such as the location of beacon placement, and what fixed objects are in the area. The Beacon is then associated with a Beacon Zone.
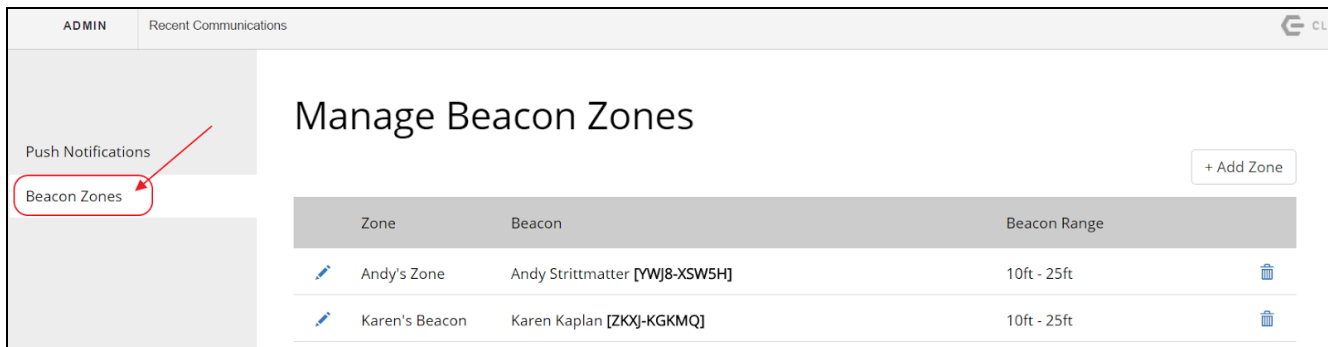
Beacon Zones

A Zone holds the beacon in a collection that associates an area of the club with the Beacon(s). A zone may contain more than one beacon, or may contain just one (more common). When defining Beacon Zones, it is important to define the why behind the zone, and answer the question what will you be triggering in the zone. For instance, a beacon placed by the 18th green could hold one beacon that would read a short range, triggering a message to Members about posting their scores. Another zone could be on the Entrance gate, and could trigger a message to the General Manager of the Club when a Board Member enters the premises.

Once the goals have been outlined, it's time to manage the beacon zones. Note: Clubessential will set up your initial beacon zones, and will assign the individual beacons into beacon zones. In the event your Club wishes to edit an existing zone, or add a new zone, perform the following.

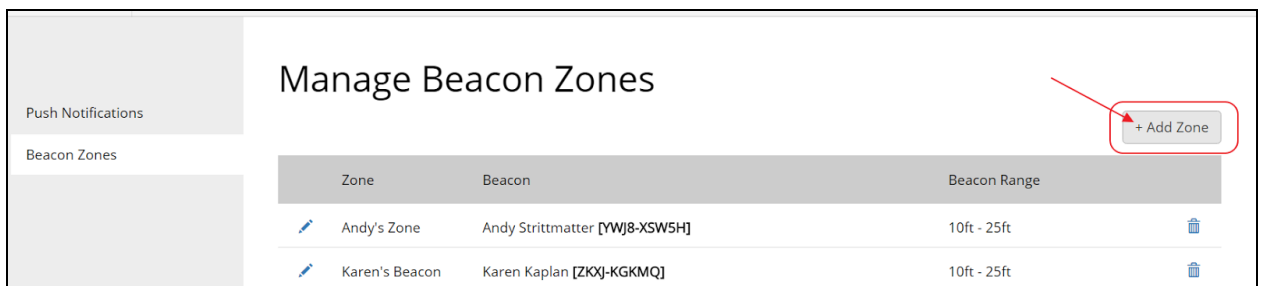To Manage a **Beacon Zone**, **click** on the **Admin toolbar**, and select **Beacon Manager**.
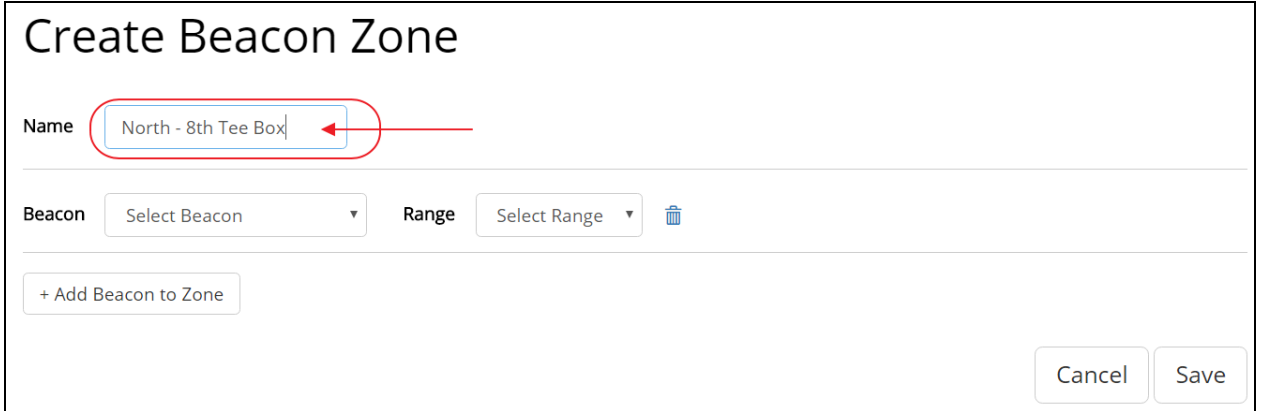
Then, click on the **Beacon Zones**.
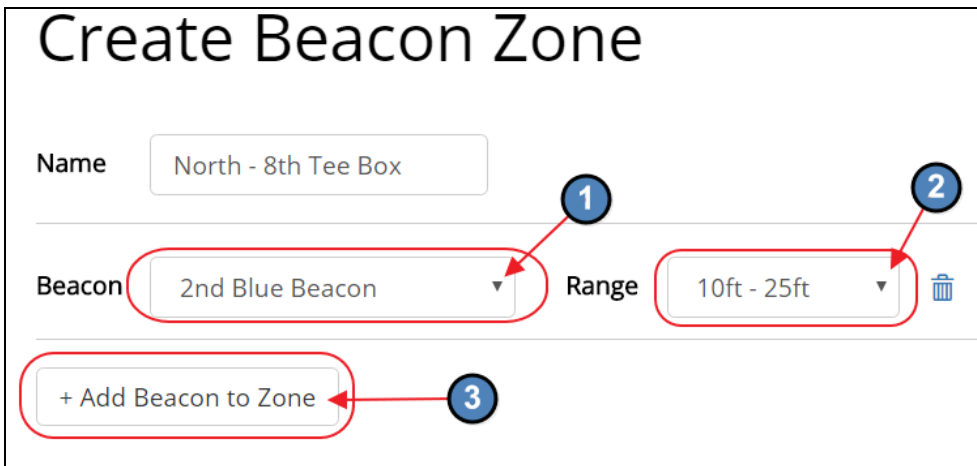
Create a Beacon Zone
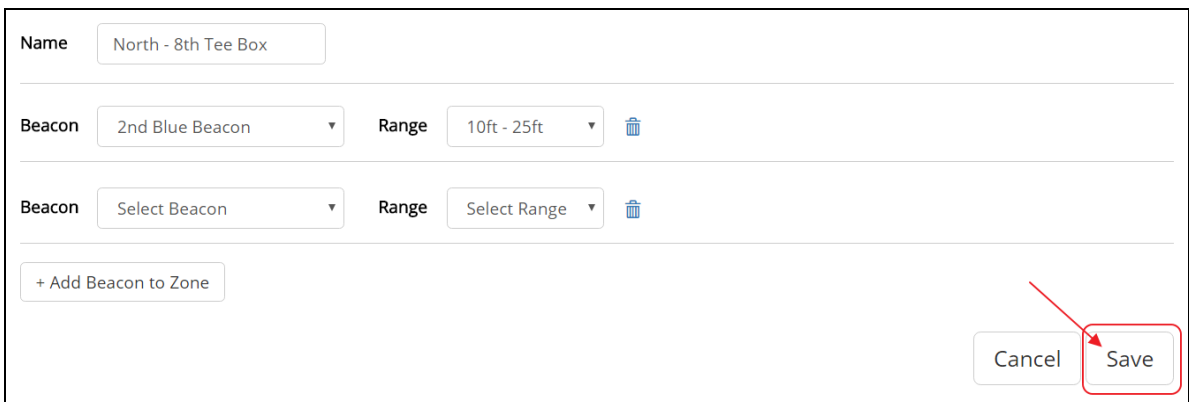
To add a new zone, click **Add Zone**.

Next, **Name** the Beacon Zone according to the physical location of where the beacon(s) will be placed for ease of reference.
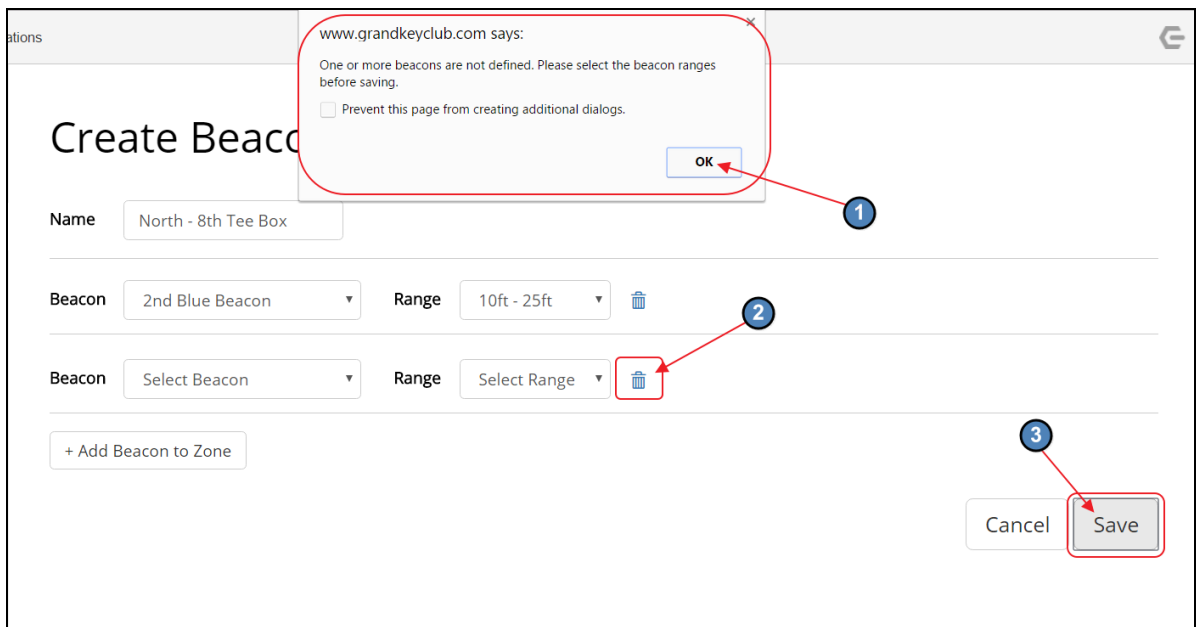

Then, select a Beacon from the drop-down list (populated by Clubessential), the desired range, and click **Add Beacon to Zone**.
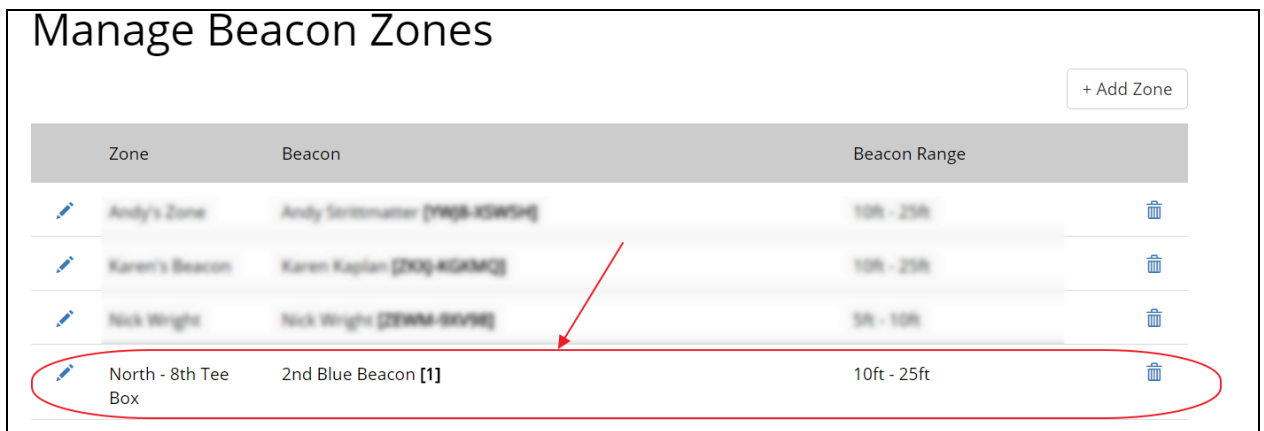

Repeat as necessary, and click **Save** when finished.

If you get an error message due to an unpopulated beacon line, click **OK** to dismiss the error message, then click the trashcan next to the blank beacon line to delete it, and click **Save** again.

Note the new zone, and assigned Beacon have been added to the list of Beacon Zones.

Edit a Beacon Zone

To edit a Beacon Zone, click the pencil next to the zone to open the **Edit Beacon Zone** screen.

Manage Beacon Zones

+ Add Zone

	Zone	Beacon	Beacon Range	
✏️	Andy's Zone	Andy Strittmatter [YWJB-XSW5H]	10ft - 25ft	🗑️
✏️	Karen's Beacon	Karen Kaplan [2XXJ-KGKMCJ]	10ft - 25ft	🗑️
✏️	Nick Wright	Nick Wright [2EWM-9KV9E]	5ft - 10ft	🗑️
✏️	North - 8th Tee Box	2nd Blue Beacon [1]	10ft - 25ft	🗑️

Make changes to the Name, or assigned Beacons, and **Save** to continue. Click **Cancel** to exit without saving.

Edit Beacon Zone

Name   North - 8th Tee Box

Beacon   2nd Blue Beacon ▾   **Range**   10ft - 25ft ▾   🗑️

+ Add Beacon to Zone

Cancel   Save

Delete a Beacon Zone

To delete a Beacon Zone, click the Trashcan icon next to the Beacon Zone to delete.

Manage Beacon Zones

+ Add Zone

	Zone	Beacon	Beacon Range	
✏️	Andy's Zone	Andy Strittmatter [YWJB-XSW5H]	10ft - 25ft	🗑️
✏️	Karen's Beacon	Karen Kaplan [2XXJ-KGKMCJ]	10ft - 25ft	🗑️
✏️	Nick Wright	Nick Wright [2EWM-9KV9E]	5ft - 10ft	🗑️
✏️	North - 8th Tee Box	2nd Blue Beacon [1]	10ft - 25ft	🗑️

Click **OK** to confirm deletion.
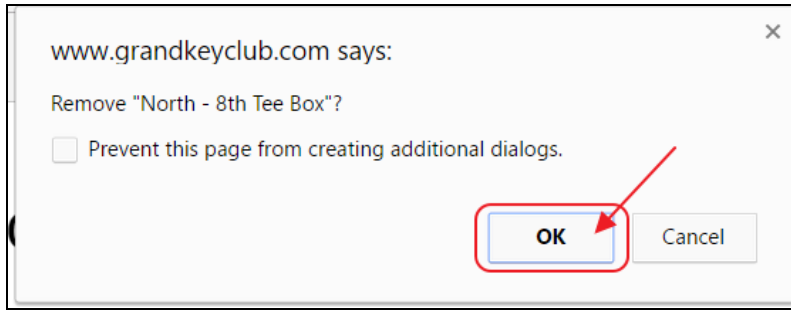
Push Notifications (for Beacons)

Once Beacon zones have been established, it is time to define what will occur in the form of a push notification, once the Beacon has been triggered.   Note: Clubessential will set up your initial push notifications. In the event your Club wishes to edit a push notification, add a new one, or delete an existing one, perform the following.

To Manage a Beacon Push Notification, click on the Admin toolbar, and select **Beacon Manager**.
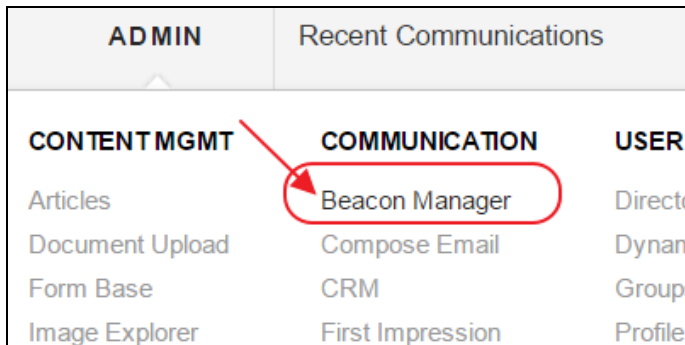
Next, or, if already in the **Beacon Manager**, select **Push Notifications** from the side menu.

Create a Notification

To add a new notification, click **Create Notification**.

Manage Push Notifications

+ Create Notification

Type	Name ∨	Zones	Status

The Create Push Notification screen will launch.

Create Push Notification

Name

1 e.g. Place order at turn

When a member enters the following beacon zone(s)...

2 Select beacon zone(s)

and they meet these conditions (optional) ...

3 + Add Condition

then send...

4 Push notification message

☐ Include a link **5**

to the following recipients ...

6 ⦿ Send to the member
○ Send to someone else

and do not send more than one notification per...

7 0   Minutes ▾   **8**

Cancel   Save

1. First, Name the Notification so that the action is identifiable.
2. Next, designate the Beacon Zone that will trigger the notification.
3. Optionally, define conditions that will be applied to determine whether or not to send the notification. For instance, if the notification is only to be triggered if the Member is in the Committee Members group, then a condition could be set as follows:

4. Define the message to be sent to the member.
5. Optionally, opt to include a link. If checked, options will load for selection.

6. Define Recipients of the message. For instance, if the Member who triggers the Beacon is to receive the message, the **Send to the member** option should be selected. In the event someone else should receive a message (ie - Club General Manager), when Member (Board Member) triggers beacon, select **Send to someone else** for more options.
7. Optionally, determine the maximum number of times a member or someone else will receive this notification.

   For example, the notification could be set to send only one time per year as follows:

   Or, any variation of times utilizing the following:

8. Finally, **Save** the notification, or **Cancel** to exit without saving.

Push Notification will be added to listing, and will be enabled (active).

Manage Push Notifications

+ Create Notification

	Type	Name ∨	Zones	Status		
✏	Member	Food at the Turn	Sales	Disabled	🗑	∨
✏	Others	Spam John's Phone	Sales	Disabled	🗑	∨
✏	Member	Pro Shop	Sales	Disabled	🗑	∨
✏	Member	Order Food	Nick Wright	Enabled	🗑	∨
✏	Member	Andy Food Order Push	Andy's Zone	Enabled	🗑	∨
✏	Member	Please Call	Karen's Beacon	Disabled	🗑	∨
✏	Others	Board Member on site	Test Zone	Enabled	🗑	∨

To disable (or turn off) the notification, click the **Enabled** button.

	Others	Board Member on site	Test Zone	Enabled	🗑	∨

To re-enable (or turn on) the notification, click the **Disabled** button.

|	Others	Board Member on site	Test Zone	Disabled	🗑	∨

Edit a Push Notification

To edit a Push notification, click the pencil next to the Notification to open the **Edit Push Notification** screen.
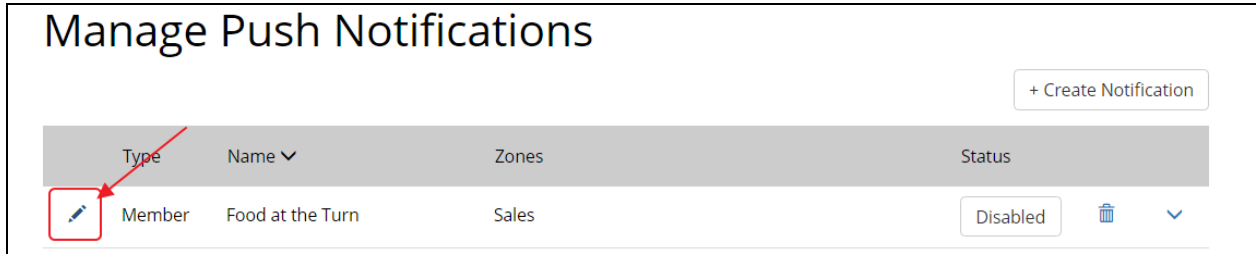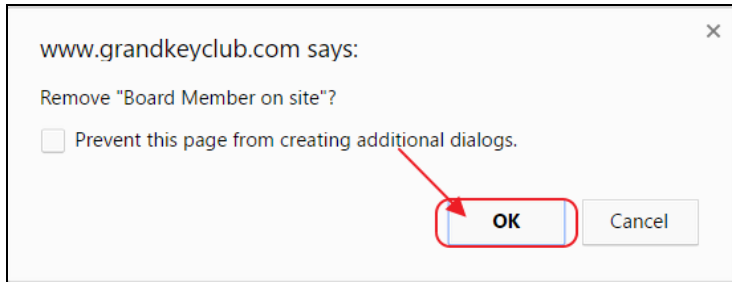

Make changes as necessary, and click **Save** to continue. Click **Cancel** to exit without saving.

Delete a Push Notification

To delete a Push Notification, click the Trashcan icon next to the Push Notification to delete.
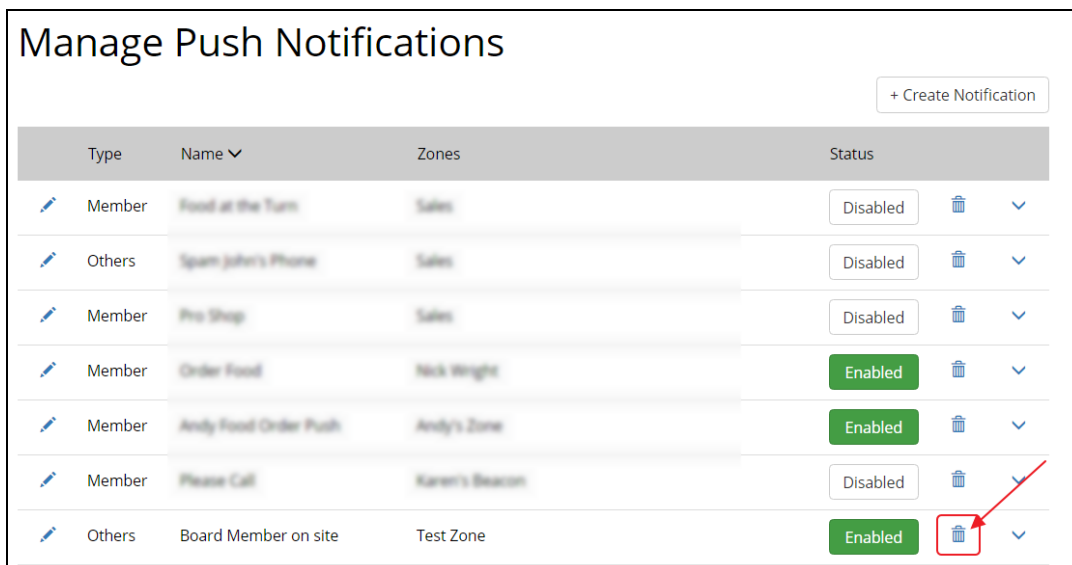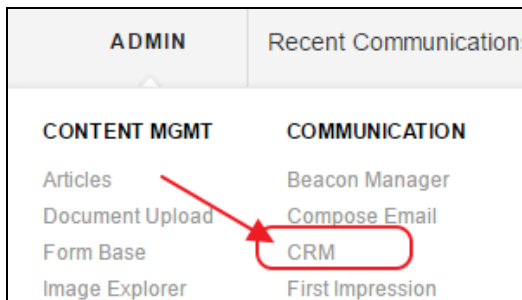
Click **OK** to confirm deletion.

Beacon Reporting

In the event your Club also has the Clubessential CRM Product, you will also be able to view reporting associated with your Beacons. To view reports within your CRM, perform the following steps.
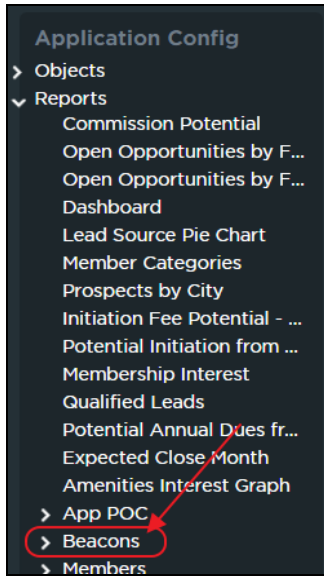
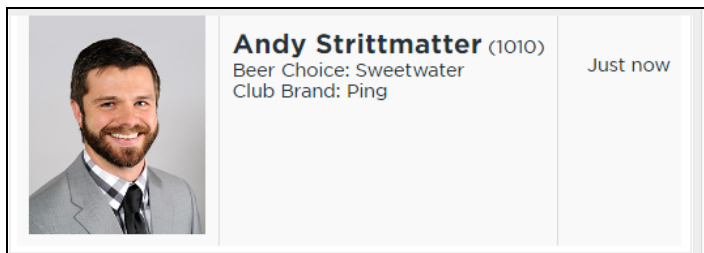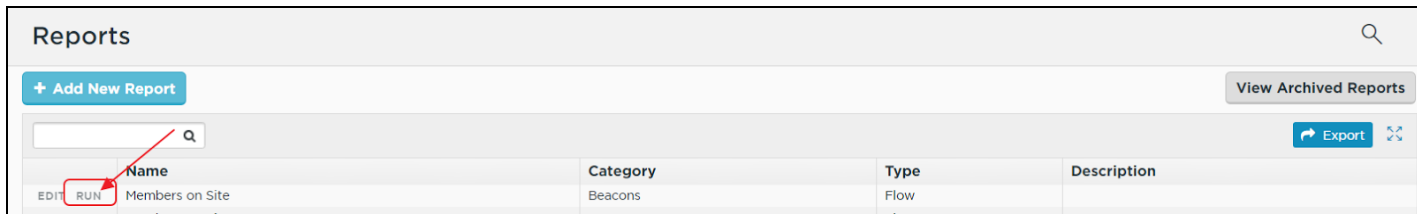Within your Website, click on the Admin Toolbar, and navigate to your Club's CRM.

From the side menu, select **All Reports (or Report Listing, etc)**. Name may differ slightly.
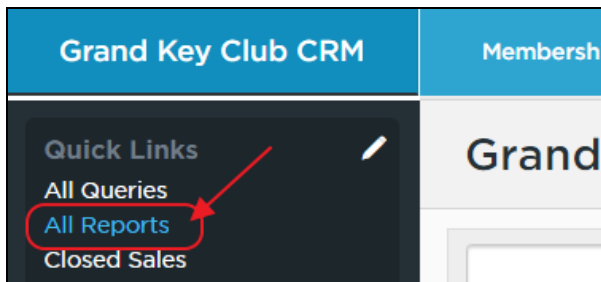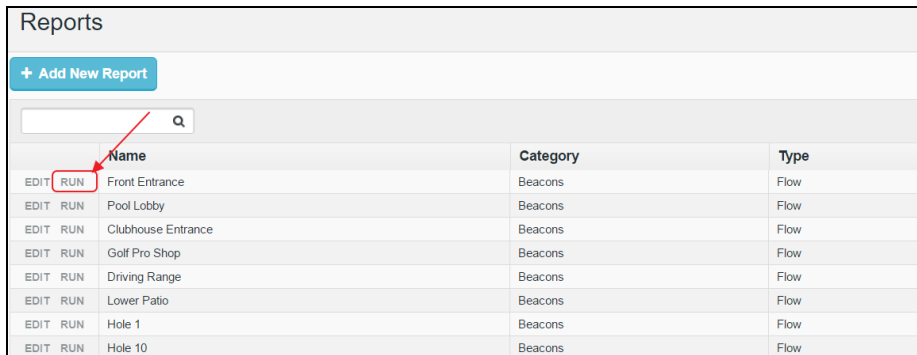

Within the Reports Menu, select **Beacons** to view listing of available Beacon reports.

Select **Run** next to desired report. Report will display Members on site by Beacon Zone, along with their Picture (if available), designated Member Preferences (if captured), and how long ago they entered the Beacon zone.
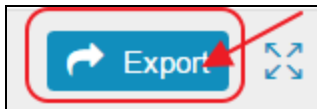

If more than one Beacon is utilized for reporting purposes, select desired report from listing.
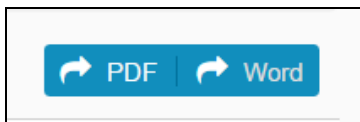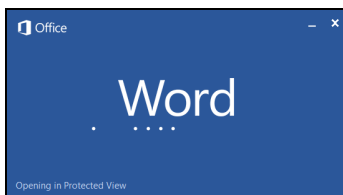
Report results may be viewed and Exported.

To export a report, hover over the export button.

Then, choose from the available formats.

Document will open in requested format.

FAQs

Q: Where is the best place to install the **beacon**?

A: **Beacons** are best placed in high areas as there can be interference with the range due to objects. The **Beacons** come with velcro that will allow you to place the **Beacon** on a wall, for instance.

Q: How many **Beacons** do we receive when we buy an **App?**

A: You will receive **5 Beacons** with the purchase of the **App,** however, you may purchase additional **Beacons** as needed. Please contact your **Account Manager** for detailed information on that process.

Q: Can I move the **Beacon?**

A: Yes! You may move the **Beacon** to any desired location. It is important to note, that during initial deployment, the **Beacon** will be named after the initial placement. For instance, if the **Beacon** is on the 4th Tee it will always remain named as 4th Tee to our Support Team, so if you move it just note that Clubessential will still refer to its name by its original placement.

Q: How long does the battery life last and will inclement weather harm the **Beacon?**

A: The battery life lasts about **1 ½ years.** To replace the **Beacon battery,** simply swap the old batteries with **4 new Double A batteries.** The **Beacons** are completely weatherproof, so inclement weather will not harm the **Beacon.**

Best Practices

Implement Beacons to encourage full usage of the App capabilities, including automatic notifications to Members to post their score, remind them of upcoming events, and to your Management team know who is on-site, and where they are located at any given time.

Use care when sending Push Notifications to ensure the frequency is appropriate. Members deeming notifications are too frequent may opt to turn off their push notifications.