TREKTRAKA OPERATOR'S PORTAL

USER GUIDE

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Cross References

Document Name	Document Description / Purpose
1. TrekTraka System Overview	This an introductory overview for use by an Operator's marketing and operations staff. It provides a very brief overview of the process to implement the TrekTraka System, use the System on a Trip and to review the marketing statistics and analytics reports provided by the System.
2. Integrating the TrekTraka Family and Friends Map Into an Operator's Website	This guideline is for use by an Operator's Web Developer. It provides detailed technical instructions on how to integrate the TrekTraka Family and Friends Map into an Operator's web site.
3. Instructions for Using the SPOT GPS Messenger Device with TrekTraka	This guideline is for use by an Operator's trek or tour leader. It explains how to use the SPOT Device during a Trip.

1   Introduction

1.1   Background

TrekTraka is a social medial marketing solution specifically addressing the needs of Adventure Travel Operators. It works by tapping into the extensive social media networks of travellers and allowing their friends and family to follow their progress in near-real time using an interactive map (Friends & Family Map) embedded within a Travel Operators web-site. The tracking data for this map comes from a GPS tracking device carried by the trip leader which periodically sends back location data while a trip is in progress.

The friends and family of people on a trip are able to visit the Friends and Family Map by clicking on a URL they receive in either a pre-trip e-mail or via during-trip posts to their Social Media news feed on platforms such as Facebook, Twitter and LinkedIn.

On a trip with 10 people who may each have an average of 200 social media friends (via Facebook, Twitter, LinkedIn, et) TrekTraka can potentially bring these 2,000 people back to the Friends & Family Map multiple times each day throughout the course of a trip. The outcome is that these social media visitors to the Friends and Family Map may conclude *"hey, I want to do that too!"*

The TrekTraka approach allows Travel Operators to engage with potential new customers at a very early stage in a customer's on-line research for their next travel experience. Early engagement with a greatly expanded pool of potential travellers should drive an increase in direct sales enquiries to the travel operator.

1.2   The Purpose of this Guideline

TrekTraka consists of two main components:

- The <u>Friends and Family Map</u>. An interactive map on the Operator's website that displays the progressive location of a trek or tour group and provides engaging content and exposure to the Operator's marketing materials and offers.
- The <u>Operator's Portal</u>. A web-based application used by an Operator's internal operations and marketing staff. It provides a wide range of functionality for managing all aspects of pre, during and post-trip preparation and management.

This document provides a detailed explanation of how to use the Operator's Portal to carry out the various initial and ongoing tasks to use the TrekTraka system.

For a high level overview of the TrekTraka System please refer to the guide – <u>TrekTraka System Overview</u>.

1.3 Definitions

Reference	Definition
Analytics Report	a suite of automated reports and simple data search functions available to Operators from within the Operator's Portal. Analytics allow Operators to monitor the key statistics relating to social media activity and Friends and Family Map visits for a specific trek or tour.
Buffer Distance	a radius, in metres, set for each point-of-interest where social media post content is to be issued automatically when the SPOT device carried by a trek leader breaches the buffer radius.
Enable	to Enable a point-of-interest means to make is visible to visitors to a Friends and Family Map. A simple step performed within the Operator's Portal.
GPS	means global positioning system.
Client Invitation Email	an e-mail automatically sent by the TrekTraka System to an Operator's clients booked on a Trip. The e-mail is issued from 1 to 3 times prior to the commencement of a Trip and invites clients to accept periodic posts to their social media accounts during the course of their Trip. "Invitation E-mail" will have a corresponding meaning.
Manual Social Media Post	a social media post issued by the Operator at any time by using the TrekTraka Operator's Portal. This may sometimes be also called an Ad Hoc Post.
Operators	Adventure Travel Operators; "Travel Operators" will have a corresponding meaning.
Point of Interest (POI)	specific points on the map that are setup using the Operator's Portal. They comprise short descriptive text with associated images or videos and may also include Social Media Post content that can be automatically sent to the friends and family of a traveller when their particular travel party reaches this location. A POI can be viewed by visitors to the Friends and Family Map by clicking on the associated star symbol that appears on the map.
Route	the region within which one or more Trips will be conducted. For example, the area covering the trip from Lukla to the Everest Base Camp may be defined as a specific Route called 'Everest Base Camp'. Routes are setup using the Operator's Portal.
SPOT Device	SPOT Satellite Personal Tracker, GPS tracking device provided by TrekTraka

	for use by Operators. Carried and operated by the trek or trip leader.
Social Media Post	short text messages issued to the social media accounts (Facebook, Twitter, LinkedIn) of an operator's clients that choose to utilise the TrekTraka service. Posts are either issued automatically by TrekTraka as the SPOT device nears a specific POI or issued manually by the travel operator.
Social Media Subscribers	Those clients booked on a Trip who have received the Client Invitation e-mail and have who have authorsed TrekTraka to issue social media posts to their social media platforms such as Facebook, Twitter and LinkedIn. In addition any other friend or family member that may have received a copy of the Client Invitation Email from their travelling friend and who also authorised TrekTraka to issue social media posts to their social media accounts.
TrekTraka Friends & Family Map	an interactive map embedded within an Operator's website. People visiting this map do so by clicking on a URL that they have received either in an e-mail or alternatively via a URL that has been posted to a Social Media news feed – for example via a post to either Facebook, Twitter or LinkedIn. "Friends and Family Map" will have a corresponding meaning.
TrekTraka Operator's Portal	a web based software application used by Operators to configure the required settings of the TrekTraka system for the specific needs of the Operators business. The Operators Portal includes an interactive map showing the location of current and past trips undertaken by the Operator. "Operator's Portal" will have a corresponding meaning.
TrekTraka System	TrekTraka Social Media marketing system for Adventure Travel Operators consisting of one or more SPOT Satellite Personal Trackers as well as a series of web based portals – including the Family and Friends Map and the Operators Portal. "System" will have a corresponding meaning.
Track Button	a button on the SPOT device (marked with a boot footprint) that when pressed on an operating device commences signalling of the device's GPS location back to a receiving satellite
Tracking Device	For most Operators this will be a SPOT Device however for some Operators this may be some other form of GPS enabled tracking device.
Trip	an actual trip, trek or guided tour undertaken by an Operator. Each is assigned a name and specific start and end date within the Operator's Portal. "Trek" will have a corresponding meaning.

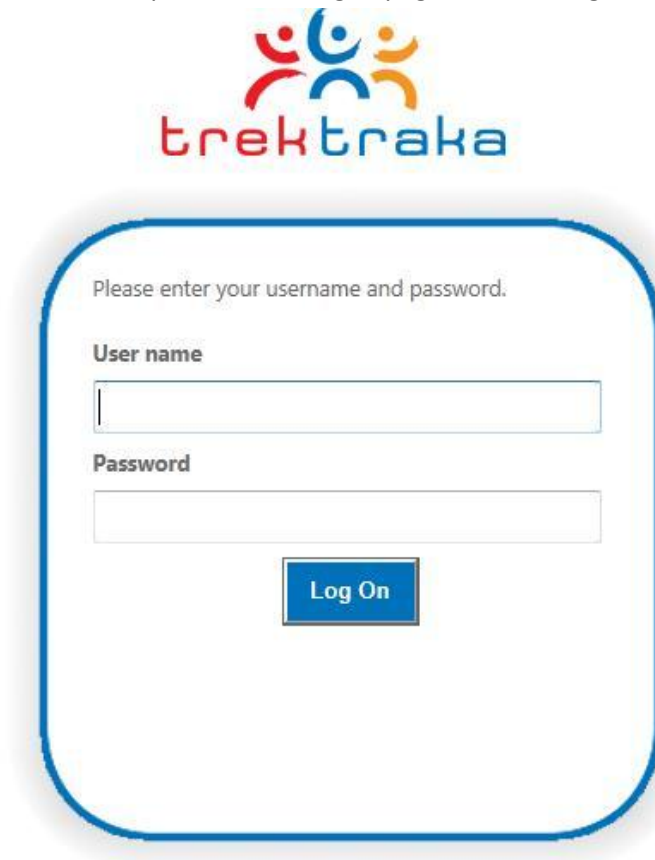|	
Trip Code	a unique code relating to a particular Trip. The Trip Code is automatically generated by the System when a new Trip is entered using the Operator's Portal.

2 Getting Started with the TrekTraka Operator's Portal

2.1 Logging in

To log into the TrekTraka Operators Portal type the following URL into your web browser. We suggest that you book mark this URL for ongoing use.

http://trektrakaadmin.cloudapp.net/

This will take Operators to a log-in page similar to Figure 1 below.

Figure 1 - Logging in to the Operators Portal

To log in, enter the Username and Password which will have been e-mail to the operator.

The Username and Password are unique to each operator. It is recommended that just one or two people in each company be given these log-in details and authorised to enter content into the TrekTraka system.

2.2   User Interface Overview

The user interface of the Operator's Portal is illustrated in Figure 2 and comprises a map and four sets of control functions - trip controls, map view controls, map zoom controls and map background controls:

Figure 2 - The Operators Portal User Interface

Trip Controls:

Trips:

Clicking the Trips button opens a list of past, current and future Trips. Clicking View for current or past trip opens a map showing the GPS-tracked path of that trip. Clicking the Edit button for a future trip allows you to edit the details of the particular trip.
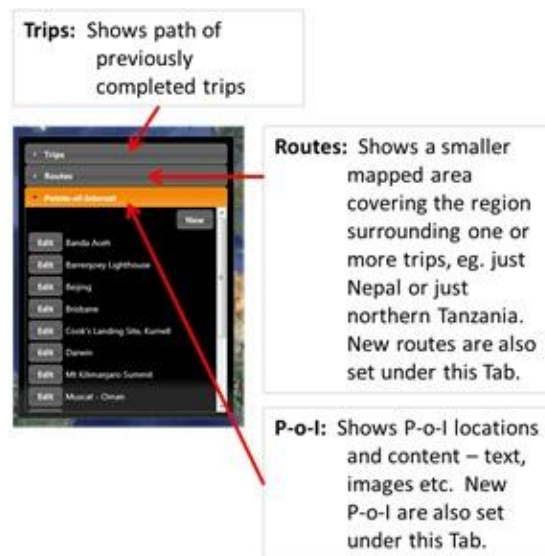
Note – you can only edit a trip that has not commenced.

Trips: Shows path of previously completed trips

Routes: Shows a smaller mapped area covering the region surrounding one or more trips, eg. just Nepal or just northern Tanzania. New routes are also set under this Tab.

P-o-I: Shows P-o-I locations and content – text, images etc. New P-o-I are also set under this Tab.

Figure 3 - Trip Controls

Routes:

Clicking Routes opens a list of previously set maps covering the region where one or more trips are located. For example, a Route map may have been set covering much of central Nepal. That Route map may have multiple previously completed trekking Trips following different valleys and paths through central Nepal.

Points-of-Interest:

Clicking on this button opens a list of previously defined POI and buttons to EDIT existing or add NEW POIs.

Map View Controls

These controls allow navigation on the main map. Only one or two are really required when up-loading POI content.

Pan:

Clicking this button allows the map to be moved up/down/left/right to centre a region of the map. Click on the map with the left mouse button and while continuing to hold down the left mouse button move the mouse cursor in any direction. This button is useful when up-loading POI content. It is best to keep this button activated when entering POI content.
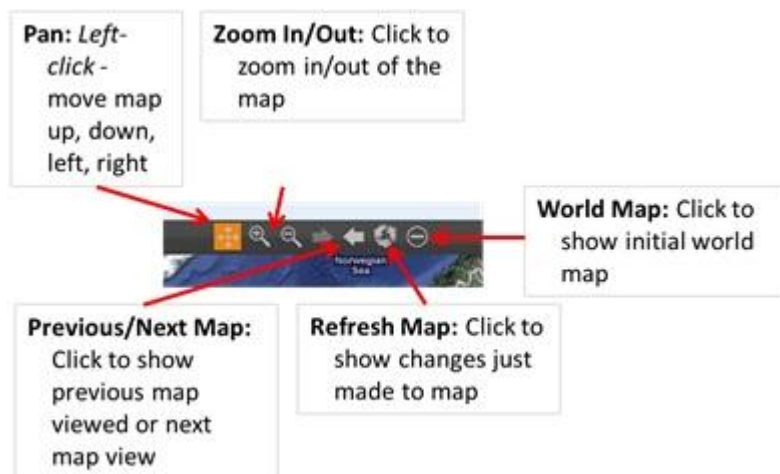

Figure 4 - Map View Controls

Zoom-in & Zoom-out:

Clicking the + button changes the cursor to allow zooming into the map for more detail. To zoom in using this button simply use the left mouse button (click, hold, slide & release) to define a rectangle. Upon releasing the left mouse button the map refreshes by zooming in to the area defined by the rectangle. Alternatively simply clicking on the map with the left mouse button zooms the map in by a pre-determined scale centring the map at the location that was clicked.

The – button has similar functionality but is used to zoom the map out.

Tip: make sure that once you have the map centred and zoomed into the desired area that you disable the Zoom In/Out functionality by clicking on the Pan button. If you don't do this the map scale will change every time the user clicks on the map which can be annoying.

Previous/Next Map:

These buttons take the user to the map view previously used or the next view. If the map reverts back to the global view it is best to click the Previous arrow and return to the map view and scale previously used to enter POI content and set their location. The Previous button is therefore quite useful when entering POI.

Refresh map:

Updates changes just made to the map. This button is not required when entering POI.

World Map:

This button reverts the map view back to the global map.

Map background controls

This button in the top right-hand corner of the map allows different map styles to be selected – aerial/satellite, road map, hybrid, shaded topographic. Either hybrid or shaded topographic are most useful for entering POI content and setting their accurate location.

Zoom slider

This is a simple slider allowing the map scale to be zoomed in or out. This function is an alternative to the Zoom-in & Zoom-out buttons mentioned above.

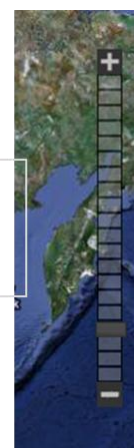**Zoom Slider:** Click to zoom map scale in/out

Figure 5 - Zoom Slider

3   Setting Up Routes

3.1   What is a Route?

A Route is a geographic region within which one or more trips may be undertaken. A Route defines the area displayed within the Friends and Family Map for a specific Trip and is also used to filter the relevant set of POI's to display for a particular trip. Routes must be created before attempting to set up a Trip.

The example explained below is for a Route covering the Sydney region, within which a Sydney Day-Tour Trip might be conducted.

Creating a Route is a simple two-step process outlined below.

Step 1 – Create a New Route
Log into the Operator's Portal and click on the Routes menu option. Click NEW.

Figure 6 - Creating a Route

Step 2 – Name and Locate the Route
Insert a Name and description for the Route in the drop-down box. Then click Locate, and using the Map View Controls (outlined above in Section 2.2) scroll and scale the map to show the region to be covered by the new Route. When the map displays the desired region, use the left mouse button (click, hold, slide & release) to define a rectangle covering the desired Route extent.
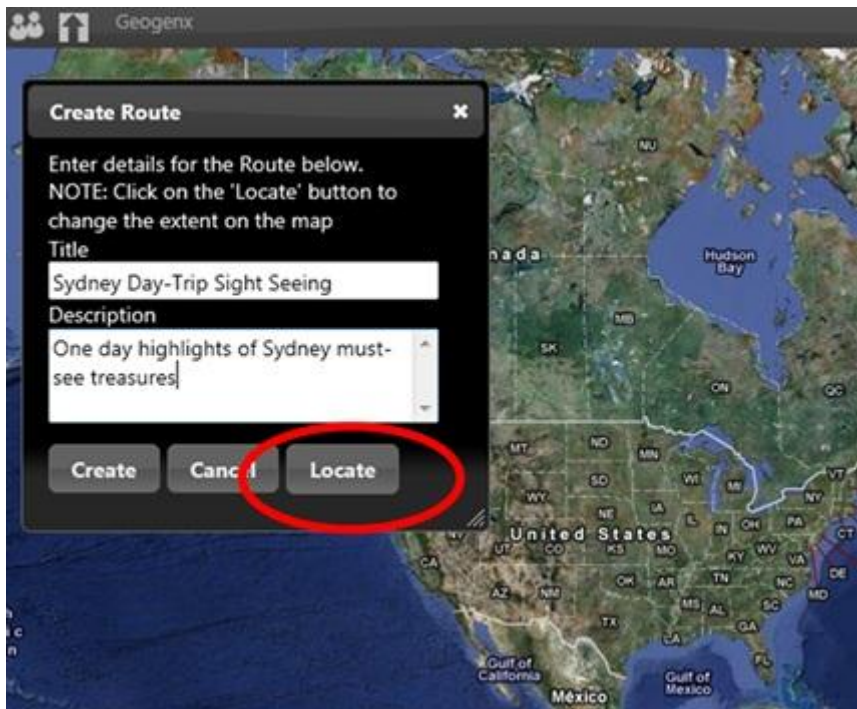
Figure 7 - Creating a Route

Click the Create button in the drop-down box to create and save the new Route.
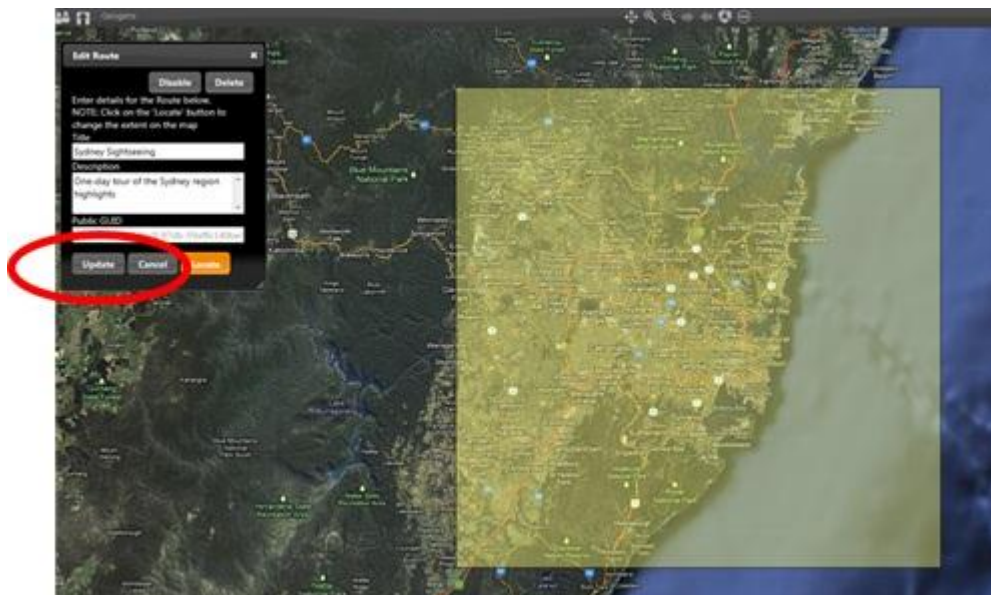

Figure 8 - Creating a Route

TrekTraka will later use these defined Routes to link URLs in social media posts to a trek-specific region within the Friends and Family Map that social media friends and followers will be brought back to on the Operator's website.

Step 3 – Set Trip Path and FocusType

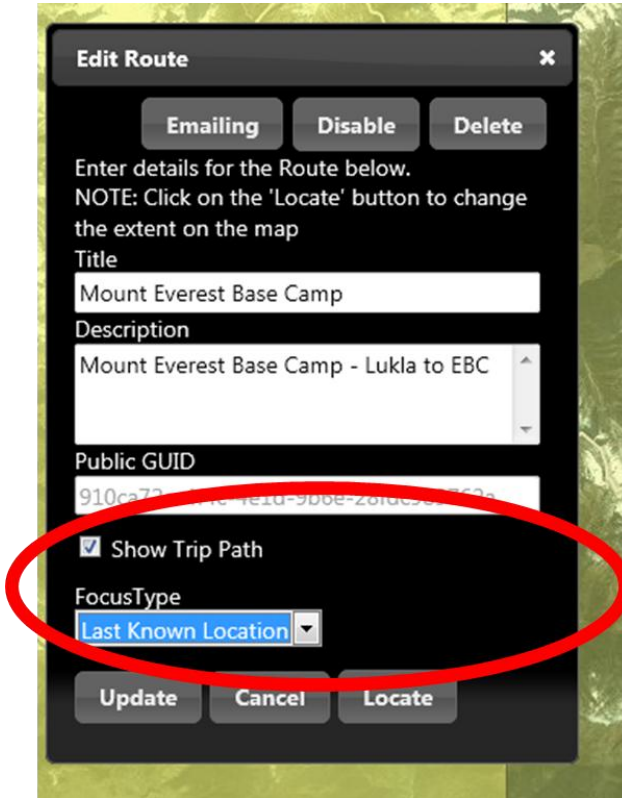There are two additional aspects of a Route that can be set:

Figure 9 Setting Trip Path and FocusType

Figure 10 Show Trip Path selected - red line joining GPS points

- **Show Trip Path** – if this box is ticked the GPS location points on the Family and Friends Map will be connected by a red line that shows the sequence of the journey. This can make it much easier for visitors to the map to visualise the path their friend has taken on the trek or tour. TrekTraka recommends this box be ticked.

- **FocusType** – this function provides two options for the extent of the map visitors will initially see when they click to the Family and Friends Map. If **Last Known Location** is selected the Family and Friends Map will open with the last known SPOT GPS location point displayed in the centre of the map. If the **Route Extent** option is selected the Family and Friends Map will display the entire area of the route as set by the shaded yellow rectangle in Step 2 above.

The Last Known Location option is very useful if a Route covers a very large area which would result in GPS location dots being tightly crowded together on the map. Also, if a trek or tour covers large distances between points-of-interest it is best to select Last Known Location. The Family and Friends Map will then display with the current location centred rather than off to one side of the map. In most instances TrekTraka recommends Last Known Location be selected.

4   Preparing Point-of-Interest Content

4.1   What is a Point-of-Interest?

A Point-of-Interest (POI) is a specific location such as a village, mountain peak, or place of historical or cultural significance that is located and described on a Friends and Family Map. It then becomes part of the engaging content that visitors to the Friends and Family Map see when they follow the progress of their travelling friend. Engaging POI's comprising interesting text descriptions and appealing images or video clips are key tools in getting visitors to conclude, *"hey, I want to do that too!"*

4.2   Content Pre-preparation

TrekTraka recommends Operators pre-prepare this content prior to commencing entering it into the Operator's Portal. Pre-preparation will greatly simplify the process of entering POI content. Pre-preparation involves the three steps outlined below.

Step 1 – List Points of Interest
Operators should start by making a list of all noteworthy locations along the journey route. This should include overnight stop points, geographic locations and features of interest such as mountains peaks, villages, cultural points of interest, sites of natural beauty or significance and points of cultural importance. In essence, any interesting photograph or video clip could also form the basis for creating a POI and assigning it to a location.

These POIs may be along the expected route of a trek or tour or anywhere within perhaps one hundred kilometres of the route. This allows cities, towns, national parks, mountains, rivers, and general locations of interesting wildlife, folklore, legends or cultural practices to be all located on the FFM as clickable POIs. This approach allows Operators to fire the imagination and interest of Friends and Family Map visitors beyond just those sites specifically along a trip path.

Give some thought to a typical day's journey on the trip itinerary and try and list at least one POI that falls within each day of travel.

Step 2 – Understand There Are Two Forms of Content
Each POI can, and should, have two forms of information content:

1)   Descriptive text, images and/or videos viewed on the Friends & Family Map. This information, unique to each POI location, forms a POI pop-up on the map. The graphic below shows how these content fields are displayed on a POI pop-up.

>   **Title**   This is the title (<30 characters, including spaces) of the content box displayed on the FFM. This might be a location name – **Kokoda** – or a short caption such as – **Rainforest & Mud**.

Description   Text of up to 255 characters (total of text and spaces) describing this location or item of interest.

Image: The file name of an image to be displayed.

Video: The URL address of a video stored on the operator's YouTube account.

LinkName   One to four words of text hyperlinked to additional content on the operator's website – potentially additional text, videos, PDF or webpage. Common LinkNames are – Read more.., More info… The LinkName is automatically formatted as a hyperlink.

Link   This is the destination URL for content the visitor is taken to if they click the LinkName.
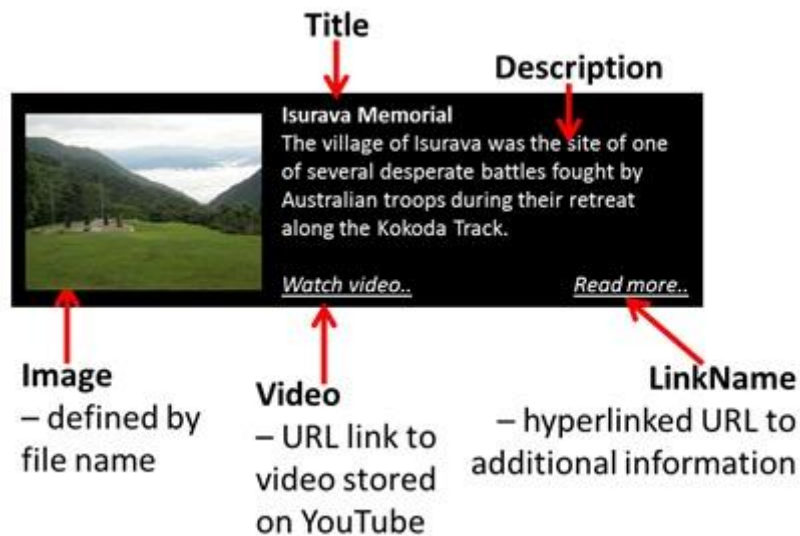
Information Fields on a POI Pop-Up

Figure 11 – POI Pop-up Box

2) Social media post content dispatched to client's Facebook/Twitter/LinkedIn accounts when the tracking device carried by the trip leader reaches the vicinity of a POI.

Long social media auto-post   Up to 255 characters of text (total of text and spaces) that will be displayed in a post to a client's Facebook Wall or Linkedin page. This content will be auto-posted when the SPOT device carried on a trek or tour comes within the vicinity of the associated POI location.

Short social media auto-post   Up to 100 characters of text (total of text and spaces) that will be displayed in a post to a client's Twitter account. As with Long Social Media posts, this content will be automatically sent when the trek or tour comes within the vicinity of the POI.

Important Tip !

The text written in the <u>Description</u> field should talk in a "passive grammatical voice". Descriptions might read as – "The village of Isurava was the site of several desperate battles fought by Australian troops during their retreat along the Kokoda Track". Descriptions should not make mention of specific trek or tour groups, their progress or experiences.

By contrast, text written for the <u>Long and Short social media auto-posts</u> should be written in the "first person plural" voice – "we". Content for Facebook might read – "We've just reached the site of the Isurava Memorial. A beautiful yet moving location that makes you stop and think of others who did it much tougher than us".

It is not essential to write social media content for every POI. However, when this content is present it allows TrekTraka to set a proximity radius around that POI and have the Tracking Device carried by the trek or tour leader trigger the dispatch of the social media posts. If the social media content is not available the basic descriptive information and images or video can still be displayed as a Family and Friends Map pop-up.

Step 3 – Write Content
With a list of suitable POIs and an understanding of what content needs to be written, in what "voice" and why, an operator is ready to start writing.

When you are first getting started, you may wish to create a simple table in Microsoft Word to store POI content for a specific trek or tour. Figure 10 provides a few examples of suitable content. Figure 11 provides a suitable table format for compiling content.

Make the text, images and any videos as interesting and engaging as possible to encourage visitors and readers to click through and maximise their dwell time on your company's website.

Trek or Tour Destination: Sydney Region

Trek or Tour Specific Product Name: Sydney Region Tour 25th November 2012

Title (<30 characters)	Description (<255 characters)	Image (File name)	Video (YouTube URL address)	LinkName (Such as More info..; Read more..)	Link (URL address for more info)	Long Social Media Post (<255characters)	Short Social Media Post (<100 characters)
Sydney Harbour Bridge	Sydney Harbour Bridge - an engineering icon of the world. Designed and built by English firm Dorman Long and Co Ltd and opened in 1932. The fifth longest spanning-arch bridge in the world. Fantastic views from the south pylon and top of the arch.	Sydney_harbour-Bridge		More Info:	http://en.wikipedia.org/wiki/Sydney_Harbour_Bridge	Taking in the sights of Sydney Harbour Bridge and the fantastic harbour and city views. Truly a wonder of the world.	Taking in the sights of Sydney Harbour Bridge and the fantastic harbour and city views.
Royal National Park	A 15,091 ha national park proclaimed on 26 April 1879. It is the world's second oldest purposed national park, the first usage of the term "national park" after Yellowstone in the United States.	Royal-national-park-cliffs		More info:	http://en.wikipedia.org/wiki/Royal_National_Park	We have just reached the entrance to the Royal National Park, just south of Sydney. Some amazing coastal scenery and walking trails.	Just reached the Royal National Park – about the hit the trails.
Barrenjoey Lighthouse	The Barranjoey Lighthouse was completed in 1881. A customs station was established in 1843 as the Headland marked the entrance to Broken Bay and the Pittwater which were considered to be the backdoor of Sydney for smugglers.	Barrenjoey-lighthouse		More Info:	http://www.lighthouse.net.au/lights/nsw/barrenjoey/barrenjoey.htm#History	We have just reached the top of Barrenjoey Head and looking up at the beautiful and historic Barrenjoey Lighthouse.	Just reached Barrenjoey Lighthouse – bit of a climb, fabulous view.
Cook's landing Site, Kurnell	On April 29th, 1770, Captain James Cook landed for the first time on Australian soil at	Kurnell			http://www.environment.gov.au/heritage/places/national/kurnell/index.html		

Figure 12 - Example Pre-Prepared POI Content

Trek or Tour Destination:_____

Trek or Tour Specific Product Name:_____

Title (<30 characters)	Description (<255 characters)	Image (File name)	Video (YouTube URL address)	LinkName	Link (URL address)	Long Social Media Post (<255characters)	Short Social Media Post (<100 characters)

Figure 13 - Example POI Content Preparation Template

5   Entering POI Content Via the Operator's Portal

It is not essential to have completed the pre-preparation step described in Section 4, however, this section assumes this has been done and therefore describes the process of "cut & paste" entering POI's using pre-prepared content that you have created within a separate document.

5.1   Entering Point-of-Interest Content into TrekTraka

Step 1 – Open the Pre-prepared content document
Open the document containing the table of pre-prepared POI content. It may be possible to share the screen space so both the map and table are visible simultaneously.

Step 2 - Positioning the Map
Start by centring the map over the region where all the POI sites are located. It is best to do this with the Pan button to move the map around and the Zoom Slider to set a scale that is most appropriate. Click the Pan button when the map covers the required area. That will stop the map zooming in or out unexpectedly when the map is clicked again.

Entering POI Content
Click the Point-of-Interest button in the Trip Controls box. Click NEW to create a new POI. Then simply copy and paste each content item from the pre-prepared table into its appropriate box on the POI drop-down. The following screen shot summarises this procedure.

To upload an image to display with a POI just click the Upload Image button, browse to find the required image and click Insert – the image file will be automatically up-loaded to the database.

To link additional information, which may be located on another page of the Operator's website, simply paste the associated URL into the Link field.

Figure 14 - Entering POI's Using the TrekTraka Operators Portal

To attach POI content to a specific location on the map, click Locate and place the cursor arrow over the POI location on the map, and left-click. If the map scale reverts to the global view, click the Previous button and then click the Pan button.

If a mistake is made or content needs to be altered just click Create to end the task and then click that POI from the list of POI and click Edit to modify the content or re-locate the point on the map.

To view the results of an up-load simply click the star displayed on the map.

5.2 Enable Display of POI Content on the Friends & Family Map

Once POI content is entered and its location defined, the POI can be Enabled for display on the Friends & Family Map. Clicking the Enable button at the top of the editing box will enable that POI.

When a POI is Enabled its star will change from red to yellow.

This step must be completed for each individual POI the operator wishes to display.

Enable: Once the POI content is entered and correct it can be Enabled to display on the Friend's and Family Map. Click **Enable**
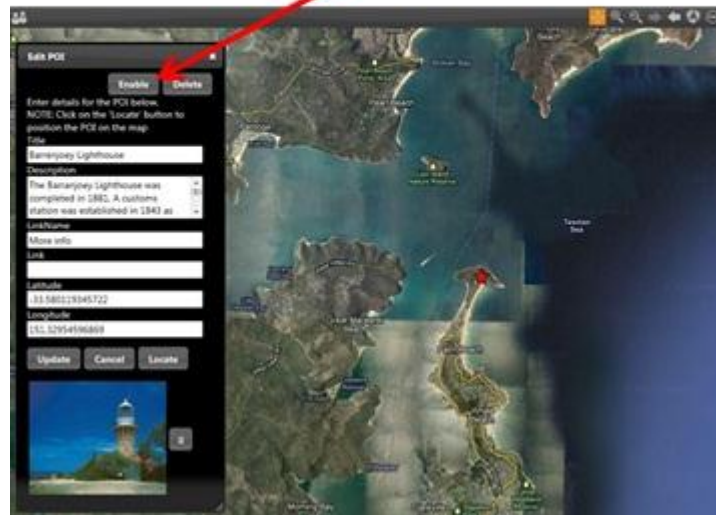
5.3 Entering and Enabling Social Media Content

Once a POI has been created it may be edited to add social media content for automated distribution.

Re-open a POI by clicking its Edit button. The Social button will now be visible on the editing box. Click the Social button.
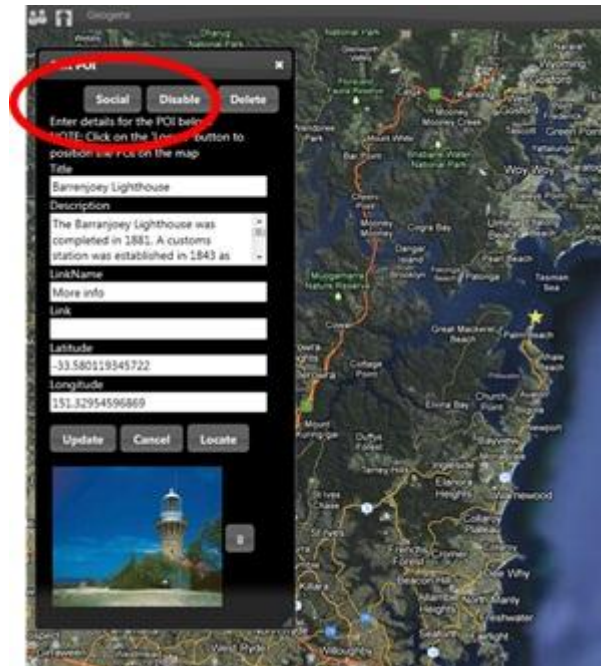
This will open a POI Social Media box.

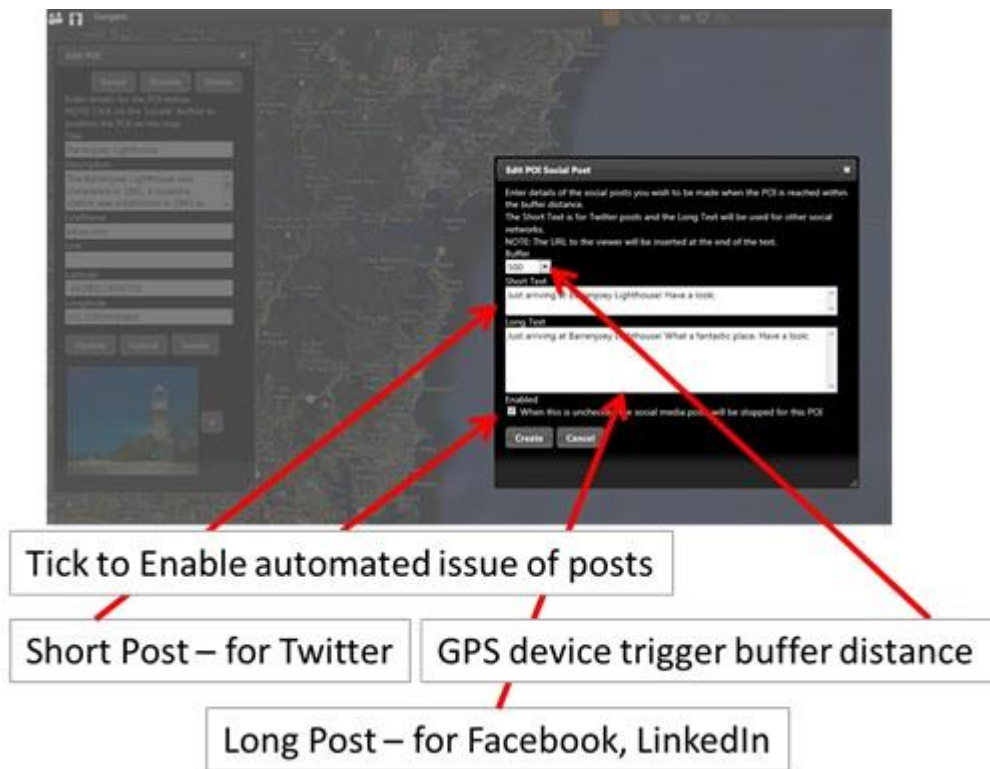Figure 16 - Entering Pre-Prepared Social Media Posts

Figure 17 - Entering Pre-prepared Social Media Posts

Insert the required text for the Short and Long social media posts. Limit the Short post to 100 characters, including spaces, and the Long post to 255 characters.

The Buffer drop-down box allows the "triggering radius" to be set, in metres and kilometres, for the proximity the SPOT device must breach to initiate the automatic dispatch of the content. The buffer distance may be set in increments between 200 metres and 100 kilometres. The larger distances are most appropriate for ocean cruises.

Tick the Enable box to allow the posts to be automatically triggered by proximity of the SPOT device. By un-ticking this box the content may remain in the database but it will not be dispatched.

Click Create to save the changes.

5.4   Setting Social Media Buffers

There may be some points-of-interest where a trek or tour group, and the leader's SPOT GPS device, will never actually set foot. An example may be a mountain summit. Such points still make great points-of-interest as they allow fantastic photographs to be displayed on the Family and Friends Map, however, no social media needs to be attached to these points as the GPS device will not

actually set foot on the mountain summit. As a result, no buffer distance needs to be set for these POI.

On the list of points-of-interest it is easy to see which POI have social media attached and a buffer distance set. These points have a circle icon beside their name.

POI with social media attached and buffer set

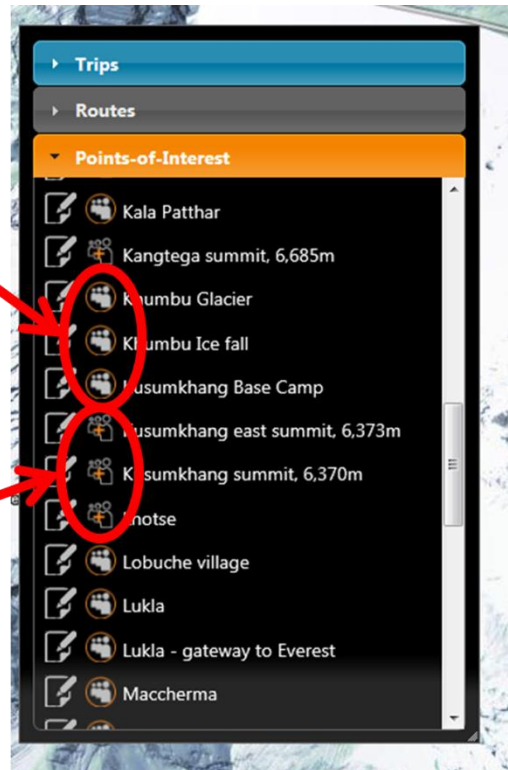POI with **no** social media attached and **no** buffer set

Figure 18 Circle icon indicates POI that have social media attached and buffer distance set

The size of a social media buffer can be displayed visually, as a shaded yellow circle around a POI star, by clicking on the circular buffer icon beside either the POI name or by clicking on a POI star and then the circular icon on its edit menu.

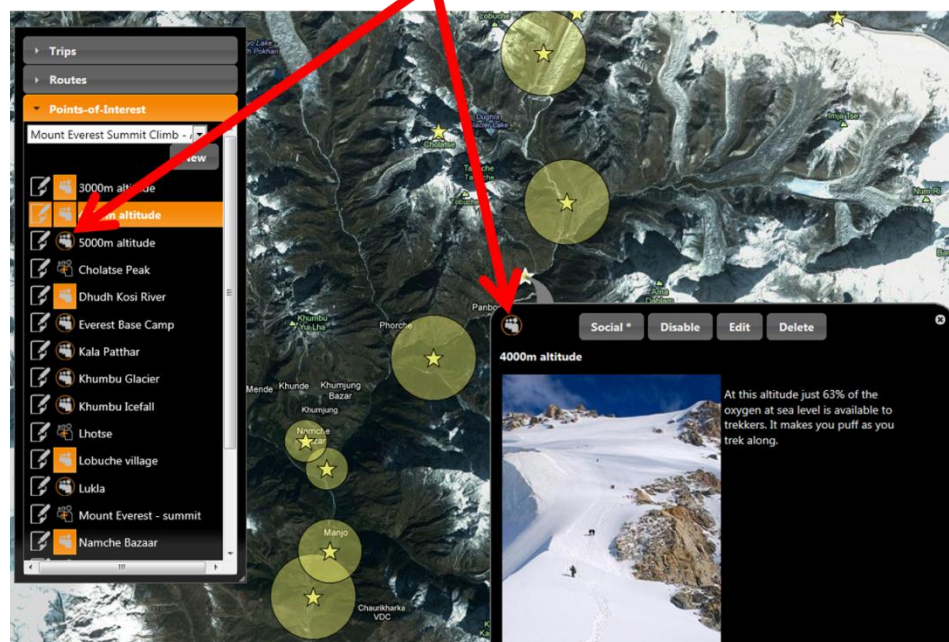Click circle icon to display shaded buffer circle

Figure 19 Clicking the circle icon visually displays the buffer distance

Visually displaying the size of buffers around adjacent POI clearly indicates where buffers overlap either other or extend over nearby POI stars.

In most instances is it perfectly fine for POI buffer circles to overlap adjacent circles. However, if a circle also extends over the star location of an adjacent POI there is the potential for social media post content to be dispatched in an unintended sequence.

It is strongly recommended that TrekTraka users watch **Tutorial Training Video 11 – Setting Social Media Buffers** to better understand the implications of setting buffer sizes and buffer overlaps.
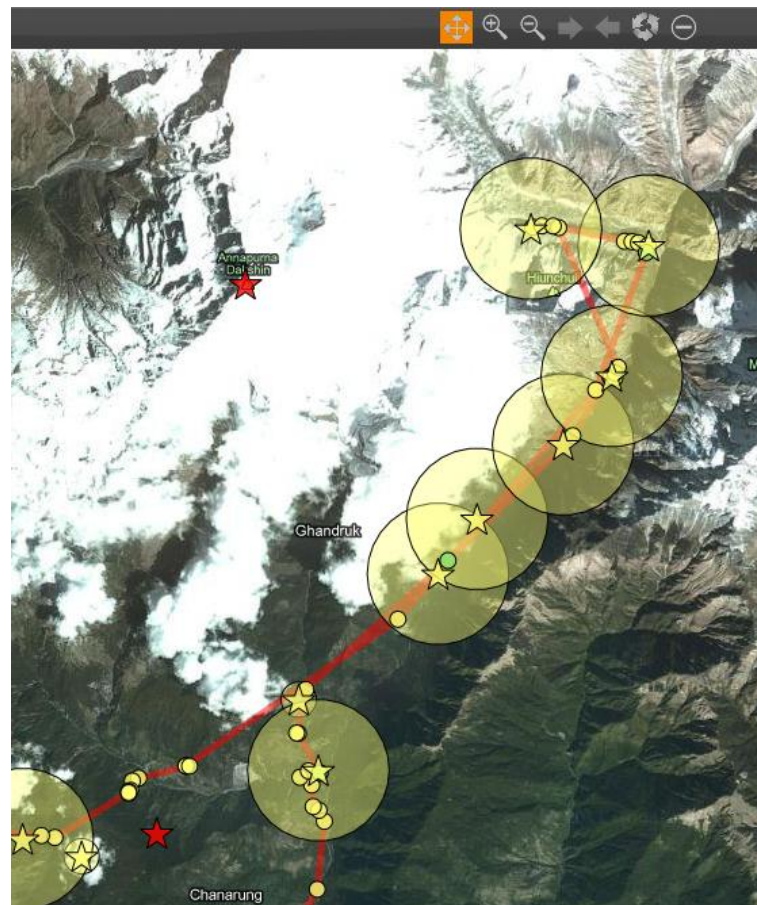
This training video is available at:

http://www.trektraka.com/trektraka-training-resources/

Figure 20 Visual display of social media buffer extent and overlaps

Tutorial 11: Operator's Portal – Setting Social Media Buffers

6   Automated Issuing of Social Media Posts

Once the social media content has been attached to points-of-interest and Enabled, it is automatically issued whenever the SPOT device assigned to a Trip enters the buffer distance for a specific POI. When the TrekTraka system determines a buffer has been entered it issues the assigned short and long social media content to the social media accounts of all Social Media Subscribers.
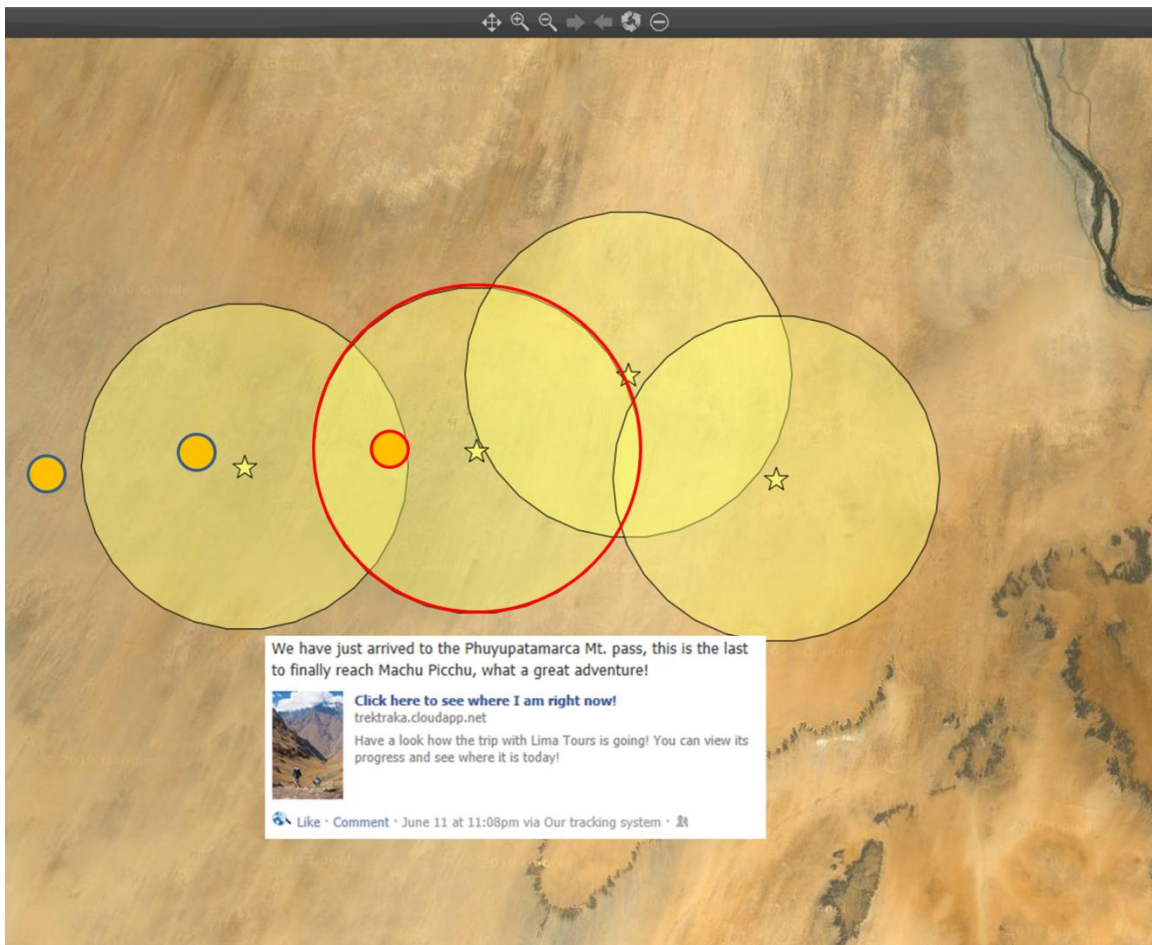
During the course of a Trip the TrekTraka system does not require any additional tasks to be performed by the Operator's marketing personnel. The issuing of social media posts attached to points-of-interest is entirely automated.

The point-of-interest content and automated social media content needs be entered into TrekTraka just once. This content is utilised again and again each time the Trip is repeated.

However, as outlined in Section 7 Operators may also issue Manual Posts if they choose to do so.

7 How to Issue Manual Social Media Posts

An Operator may manually issue social media posts to the social medial accounts of the Social Media Subscribers. This is in contrast to pre-set automated posts that TrekTraka issues based on the proximity of a Tracking Device to the various points-of-interest.

7.1 Client Privacy Considerations and Timing Limitations

The TrekTraka system only permits Operators to manually issue social media posts during the period prescribed by the StartDate and EndDate dates specified for a particular trek or tour. Currently active trips are highlighted in yellow on the list of Trips. Manual posts can only be issued on these yellow highlighted trips. In addition, the System will allow one additional Manual Post to be issued within seven days following completion of a Trip. This limit is set to ensure Operators do not excessively post communications to their clients (spam) and breach the privacy trust of their clients.

7.2 Selecting the Correct Trip

Operators must first log in to their Operator's Portal.

In the top left hand corner of the Operator's Portal map is a group icon. Clicking on the group icon will open the Manual Social Media Post data-maintenance screen as illustrated Figure 22.
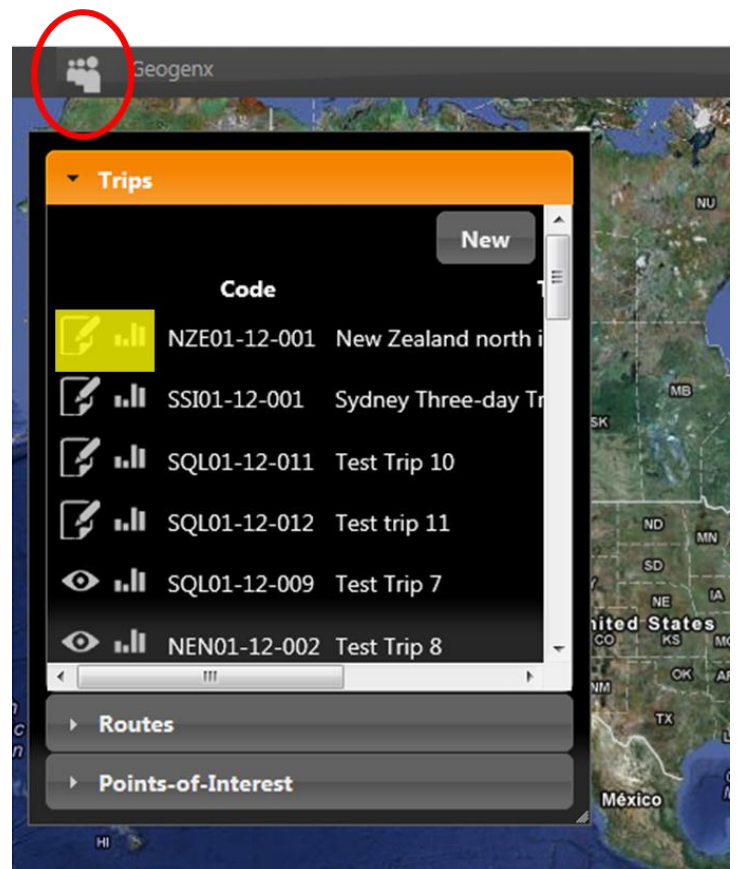
Figure 21 - Sending Manual Social Media Posts

In the Manual Social Media Post data-maintenance screen, select the correct Trip. This may only be a trip that is currently in progress.
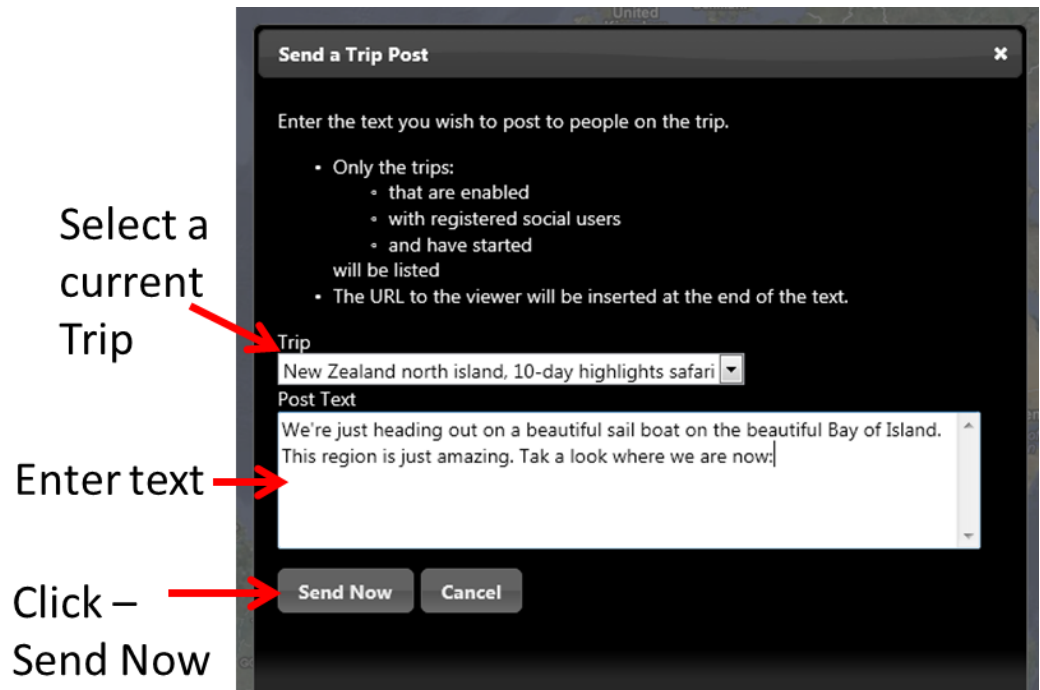
Figure 22 - Sending Manual Social Media Posts

Insert the text for the post into the Post Text box.

Click Send Now to immediately issue this Post.

7.3   Where the Post is Distributed

These posts will be sent to all Social Media Subscribers who have authorised TrekTraka to issue posts to their social media platforms. These Members of the Trip had previously clicked the icon for Facebook, Twitter or LinkedIn on a Client Invitation E-mail they received before the trip commenced.

8   Setting-Up Trips

When an Operator has completed entering the required point-of-interest and social media content for a trek or tour one or more specific Trips may be defined that will utilise this content.

Creating a Trip in TrekTraka involves entering a short name and description and start and end dates for each trek or tour. This step then opens additional functionality to the Operator to compose and issue a Client Invitation E-mail for the Trip. (An update to this "TrekTraka Operator's Portal User Guide", to be released soon, will include instructions regarding the e-mailing system.)

Creating a Trip also generates a unique TripID code that TrekTraka uses in Client Invitation E-mails and social media posts to bring friends and followers back to the correct Friends and Family Map on the Operator's website.

If, for example, an Operator were to conduct a trek, say Everest Base Camp, on a monthly basis, a new Trip instance must be created in TrekTraka for each of those treks. However, the process is quick and simple and typically takes just 30 seconds to create a Trip. The following steps outline the process.

8.1   Step 1 – Open New Trip entry screen.

Log into the Operator's Portal. In the Trip Controls screen click Trips and then New. That will open a new data-maintenance screen that accepts the specific details for a Trip.
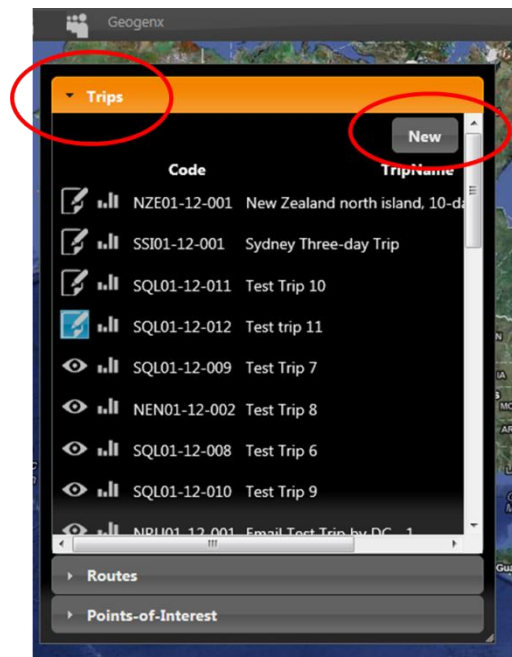

Figure 23 The Trip Controls screen

8.2 Step 2 – Enter the Specific Trip Details

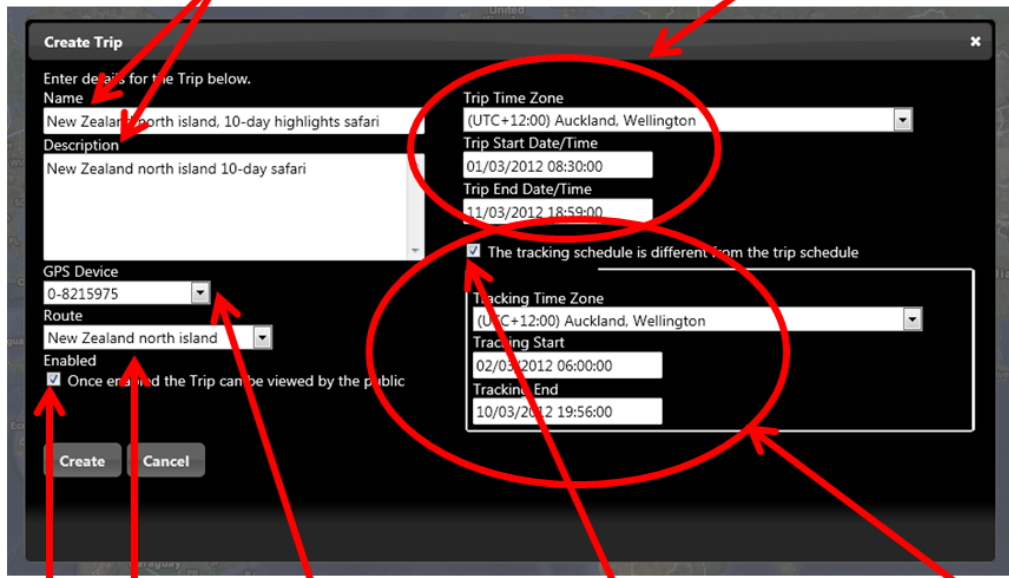Enter a Name for the Trip. Enter a short Description.

From the list of SPOT devices assigned to the company and displayed in the GPS Device drop-down box, select the specific device that will be carried by the trek leader on this Trip.

Select the correct Route covering this Trip. That will assign the correct Friends and Family Map and points-of-interest to this Trip.

Click Enable to make this Trip and its associated Friends and Family Map visible to visitors provided with a link to this Trip via a Client Invitation E-mail or social media posts issued for this Trip.

Figure 24 Trip Name, Description and Date & Timing Controls

TrekTraka allows Operators to manage the social media marketing of Trips conducted anywhere in the world. As a result the Trip management system must accommodate Trips conducted in any time zone around the globe. In the Trip Time Zone controls select the UTC time zone within which this trip will commence. For example, an Operator based in Melbourne, Australia, may conduct a Trip in New Zealand commencing in the Auckland time zone – in this instance, select the UTC Auckland time zone.

However, some Trips may publish an itinerary telling members a trip starts at say Melbourne airport on March 1st, 2012. However, TrekTraka GPS tracking and posting to the associated Friends and Family Map may not commence until the following day at 6:00am Auckland time. In this case the GPS tracking will be scheduled to commence or terminate at a date and time different to the published itinerary date. The Operator should Tick the "schedule is different" box and enter the required dates and times for the GPS tracking to commence and terminate.

This ability to set differing GPS tracking dates and times is particularly useful for Operators utilising a single SPOT device on sequential Trips that start shortly after a preceding trip terminates.

8.3 Editing Trip Details

The specific details for a trip may be edited prior to the StartDate being passed. Once the StartDate has been passed the Trip details are locked.

Trip details may be edited by clicking on the edit icon beside the desired Trip. This opens the Trip data-maintenance screen where information may be changed and save by clicking Update.
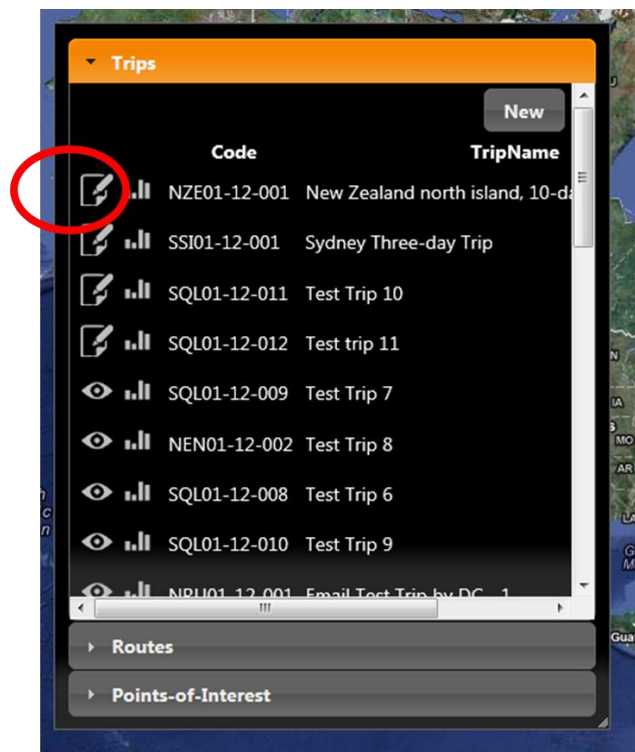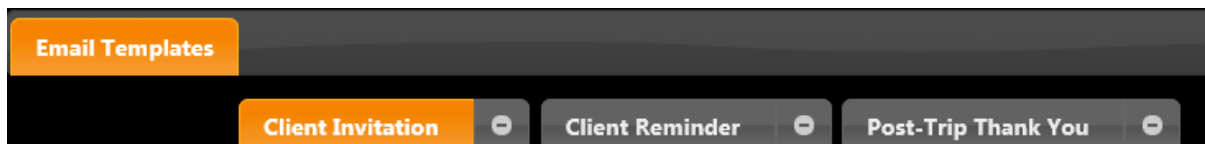
9   E-mail System

9.1   Three Core E-mail Templates

TrekTraka provides operators with the ability to send three uniquely configured e-mails to clients:

1. **Client Invitation.** This is the initial e-mail sent to client perhaps 14 days prior to departure. It explains the social media update service and requests clients to opt-in to the service.

2. **Client Reminder.** Sent to clients perhaps 7 days prior to departure. Essentially identical to the Client Invitation, but may include a "gentle reminder" prompting sentence or paragraph.

3. **Post-Trip Thank You.** Sent to clients perhaps 5 days after the end of a trip. It may thank them for travelling with the operator and encourage subscribing to a company newsletter or friending the company on Facebook – thus opening up an on-going sales communication conduit.

9.2   The Role of the E-mails

The single most important role of the Client Invitation and Client Reminder e-mails is to encourage clients on a trek or tour to allow the TrekTraka system to issue periodic posts to their accounts on Facebook, Twitter and LinkedIn. To do this they must authorise each of their social media platforms to accept automatic posts from the TrekTraka system.

These emails contain a number of social media buttons and when these are clicked by the e-mail recipient an authorisation process is initiated for the associated social media platform. Once the recipient completes the authorisation process the TrekTraka system will then be able to automatically post updates to the travellers social media platform throughout the trip.

The Client Invitation and Client Reminder e-mails need to explain the nature of the social media update service and secure the recipient's participation. The system comes pre-loaded with a number of default emails that can be edited.

9.3   Mandatory Components of Invitation E-mails

There are two absolutely essential items that must be included in all invitation e-mails.

1. The **Social Media Buttons** for Facebook, Twitter and LinkedIn must be present. If they are omitted the e-mail recipient cannot subscribe to the periodic update service. These buttons are inserted into the e-mail with the tag, **[@SocialButtons]**, selectable from the drop-down

list of Auto Insert Tag options. You will not be able to save your email template if the [@SocialButtons] tag is not present.

2. The **Friends & Family Map URL**, creating a direct link to the Friends & Family Map specific to a particular trek. This URL is clickable in the e-mail and takes the visitor directly to the map. It is very common for invitation e-mails to be forward multiple times between family members and friends. Many of these e-mail recipients return to these "old" e-mails again and again during the course of a trip and click back to the map. As a result it is very important the URL be included in invitation e-mails. It is inserted with the tag, **[@SocialLink]**. Again the system will not let you save your email template if the [@SocialLink] tag is not present.

3. A third highly recommended item is a link to a **2-minute Client Invitation Video**. A unique video is prepared by TrekTraka for each Operator and incorporates the Operator's branding and website. The video, stored on YouTube and played from there, answers most questions that your travelling clients will ask about the social media service and encourages your clients to authorise the service to post to their social media platforms. While the video is not an essential item on invitation e-mails, its inclusion is highly recommended.

9.4   Three Tier Hierarchy for Editing E-mail Templates

A core operational philosophy underlying the design of the TrekTraka system is "allow operators to create content once and re-use it again and again with minimum further effort". For this reason the e-mail system employs a three tiered hierarchy that can allow operators to format their three core e-mails just once and then utilise them un-altered, and automated, for all Routes and Trips. However, every operator has unique needs so TrekTraka has also provided operators with the ability to modify e-mail templates for specific Routes and Trips if they require.

The three tiered hierarchy for formatting e-mail templates comprises:

1. **Company Settings Level.** When an operator first subscribes to the TrekTraka service and is given access to the software system, they are provided with a set of three default e-mail templates for the core e-mails (i) Client Invitation, (ii) Client Reminder, and (iii) Post-Trip Thank You. An operator may decide to modify these default e-mail templates, or use them as supplied.

   This Company Settings Level is only accessible by operator personnel provided with Administrator Access to the TrekTraka system. For all other personnel this part of the TrekTraka system will not be visible as part of their interface. For this reason, for the great majority of TrekTraka users these Company Level instructions can be ignored.

2. **Route Level.** An operator may offer a diversity of travel products (treks, cruises, bike tours, etc) and it may be most appropriate to issue the three core e-mails with content reflecting

the unique aspects of each type of travel product. TrekTraka allows operators to create and save a set of core e-mail specific to a cruise Route, and other sets specific to perhaps a trek Route and another for a bicycle tour Route. Once created these Route-specific e-mail templates may be used again and again for future cruise, trek or bike-tour Trips.

3. **Trip Level.** There may be occasions where the e-mail content for a specific Trip needs to be modified. For example, a specific Mount Kilimanjaro trek may plan to raise funds for a specific charity group. In this instance the Client Invitation e-mail might be modified to include the logo of the charity and make reference to it in the text. However, making these changes at the Trip level leaves the original content set at the Route level of the Mt Kilimanjaro Route unaltered. This allows other Mount Kilimanjaro Trips not raising funds for a charity to utilise the e-mail templates previously saved at the Route level.

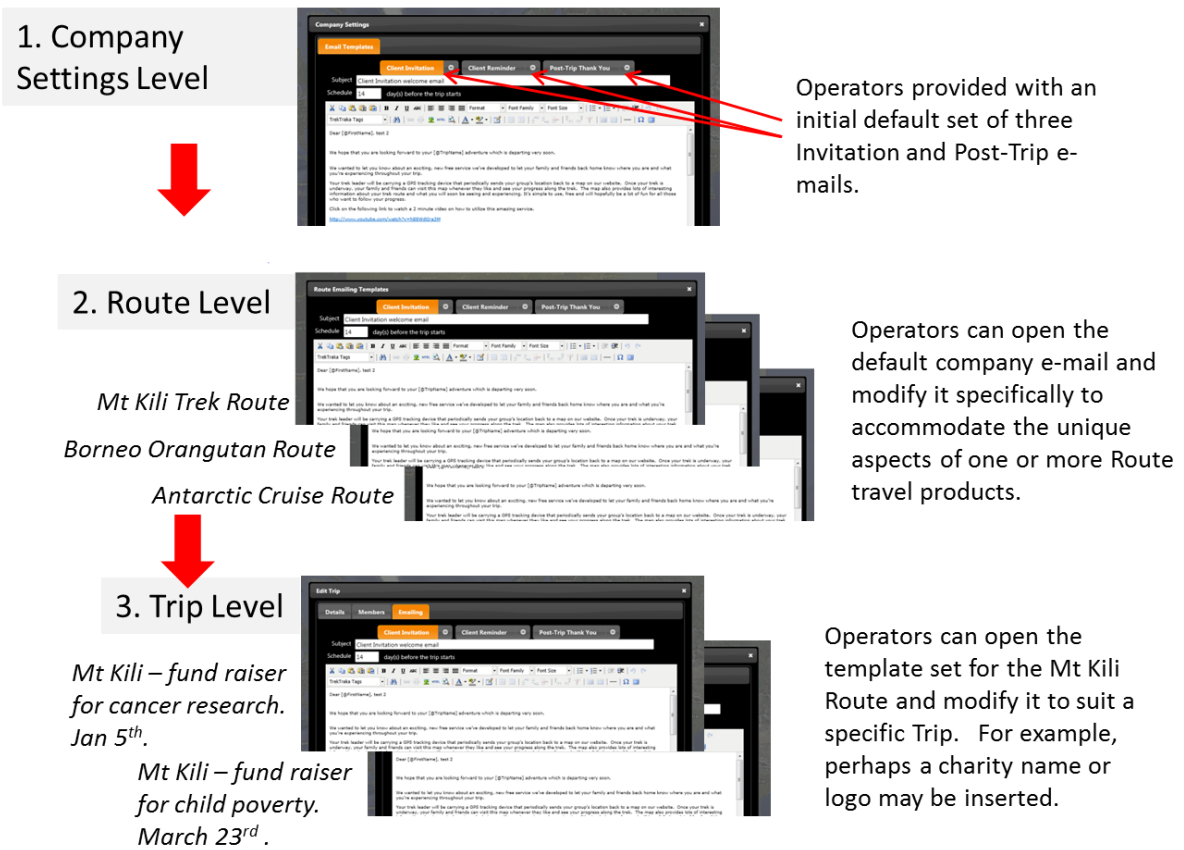The following diagram reiterates the nature of the three tier hierarchy outlined above.

Figure 25 - Email Template Hierarchy

9.5   E-mail Editing Functions

All three levels of e-mail utilise the same set of editing functions and tools. The Figure 26 shows how the e-mail editing interface identifies the main functions. The main functions and their operation are:

- Three core e-mail menu buttons. Clicking on these buttons will respectively display the current default e-mail content for each e-mail. This displays the content and makes it available for editing.
- E-mail subject. This is the subject title to display to the e-mail recipient when it is sent.
- E-mail send schedule. This allows the three e-mails to be sent at predetermined times, as follows:
    - Client Invitation. The initial invitation e-mail can be scheduled to be automatically dispatched to the list of clients on a trek or tour a number of days prior to the Trip StartDate set for this Trip (See Section 9.1 more details). For example this may be set as 14 days prior to the Trip StartDate.
    - Client Reminder. The same as above. But set closer to the Trip StartDate, for example 5 days.
    - Post-Trip Thank you. Similar to above. But scheduled for dispatch some days after the Trip EndDate, typically for when trip clients have returned home and have access to their e-mail.
- List of auto-insert tags. The TrekTraka database stores a small number of specific pieces of information entered for Routes, Trips and Members (clients booked on a specific trip). Using these tags it is possible to very simply and automatically insert information such as a client's name or a Trip start date into an e-mail.
- Update. Clicking this button saves changes made to the e-mail template.
- Cancel. Clicking this button deletes any unsaved changes to the e-mail.
- Insert e-mail address to test or preview. Once an e-mail has been edited it can be sent to an e-mail address as a test. This allows the quality of the formatting to be checked at the recipient's end. In most instances the operations staff member performing the editing will insert their own e-mail address and click Send Preview.
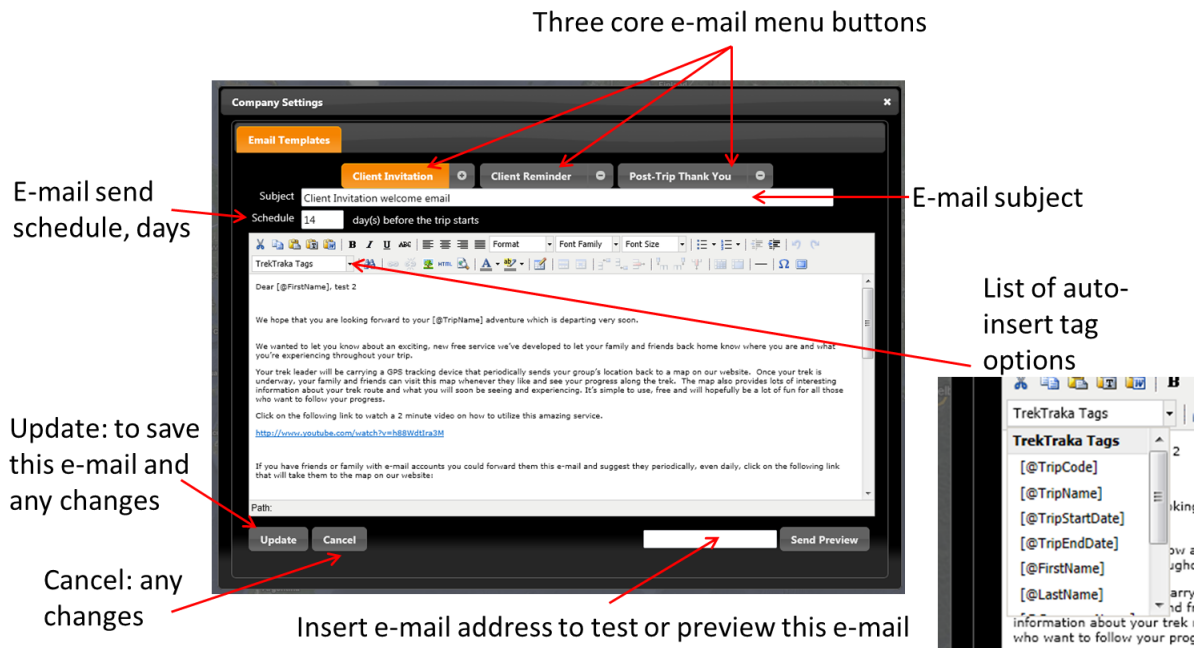
Three core e-mail menu buttons

E-mail send schedule, days

E-mail subject

List of auto-insert tag options

Update: to save this e-mail and any changes

Cancel: any changes

Insert e-mail address to test or preview this e-mail

Figure 26 - Email Template Editing

9.6   Typical Workflow for Setting-Up E-mail Templates

The following processes outline how an operator may modify and set up the three core e-mail templates in each of the three hierarchy levels of the e-mail management system.

9.6.1   The Company Setting Level

As indicated above in Section 9.4, only personnel provided with Administrator Access to the TrekTraka system will see this Company Settings Level of tools. For all other personnel this Guideline section can be ignored.

This task is performed by the Administrator when initially implementing the TrekTraka system within the company. Subsequently, it is very unlikely the operator will need to modify the three e-mail templates at the Company Settings Level again. This level is only visible to an operator's personnel provided with an Administrator level of system access.

To open the e-mail system at the Company Settings Level click on the company name in the left of the upper menu ribbon.

A new data-maintenance screen will open with three clickable tabs:

1. **Client Invitation**
2. **Client reminder**
3. **Post-Trip Thank You**

Clicking on each tab will display the default e-mail content initially provided by TrekTraka.

Operators should read the default e-mail content carefully and decide whether it is satisfactory to use as-is or requires modification.

Figure 27 - Editing the Company Level Email Templates

Editing the e-mail is very straightforward. A wide range of formatting tools is available in the menu ribbons of the e-mail editor.

The most critical pieces of content to include in the e-mail (outlined in Section 9.3) are:

- The **Social Media Buttons** for Facebook, Twitter and LinkedIn. These buttons are inserted into the e-mail with the tag, **[@SocialButtons]**, selectable from the drop-down list of Auto Insert Tag options.

- The **Friends & Family Map URL**, creating a direct link to the Friends & Family Map specific to a particular trek. It is inserted with the tag, **[@SocialLink]**.

- A **2-minute client-invitation video** will also be inserted into the default e-mail content by TrekTraka. TrekTraka recommends Operators include this video, actually a hyperlink to the video stored on YouTube, as it helps address any questions trekking clients may have and maximises the Subscription rate.

The invitation e-mail may also include auto-inserted information specific to the intended recipient of the e-mail and their specific Trip. The drop-down box TrekTraka Tags provides these insertable email Tags. The Tags and, their meaning, are as follows:

- **@TripCode** inserts a unique code TrekTraka creates for each trip. However, it is unlikely Operators will choose to display this code in an e-mail.
- **@TripName** inserts the short name assigned to a specific Trip when the Trip was created in the Operator's portal. A name might read "Everest Base Camp Trek" or "Kokoda Track Trek".
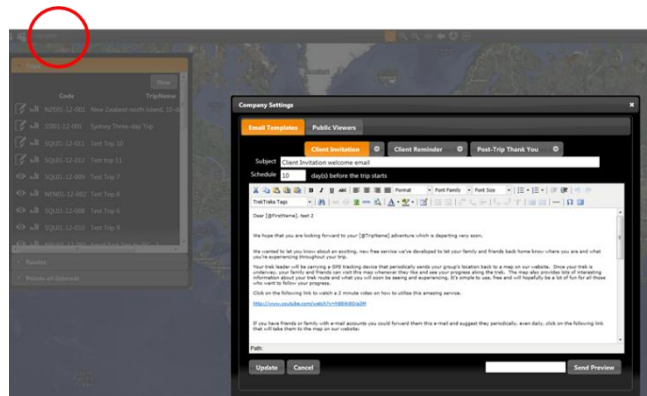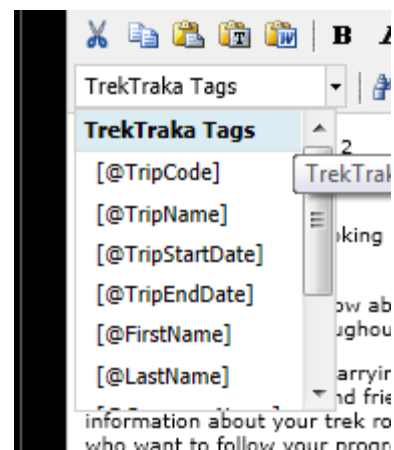- **@TripStartdate** inserts the trip start date assigned to a

Figure 28 - Email Tags

specific Trip when the Trip was created.

- **@TripEndDate** inserts the trip end date assigned to a specific Trip when the Trip was created.
- **@FirstName** inserts the intended recipient's first name. For example, the draft e-mail may read Dear [@FirstName], this will be displayed in the received e-mail as perhaps, Dear David.
- **@LastName** inserts the last name of the intended recipient.
- **@CompanyName** inserts the company name of the Operator.
- **@CompanyPhone** inserts the phone number of the Operator.
- **@SocialButtons** inserts the three social media icon buttons for Facebook, Twitter and Linkedin.
- **@SocialLink** inserts the URL specific to the Friends and Family Map for a Trip.

It is not essential that all these tags be utilised in Invitation E-mails. The following tags are mandatory: [@SocialButtons], [@SocialLink], and [@TripName]. . The system will raise an error if you try to save changes to an email template without entering the above mandatory tags.

Operators should first edit the Client Invitation and Client Reminder e-mails. It is likely their content will be largely identical apart from an opening comment regarding the reminder context of the Client Reminder E-mail. The Subject for each e-mail might also alter slightly with the term "reminder" being included in the Client Reminder e-mail subject.

As changes are made they can be saved by clicking the Update box on the lower-left of the editing window.

The date for the automated dispatch of each e-mail also needs to be set. In the Schedule box simply enter the number of days prior to the TripStart date that the e-mails will be automatically dispatched. For example, the initial Client Invitation might be scheduled for dispatch 14 days prior to the start of the Trip and the Client reminder perhaps 5 days prior.

The Post-Trip Thank You e-mail is edited similarly. However, in this instance the @SocialButtons tag is not included in the available email tags.
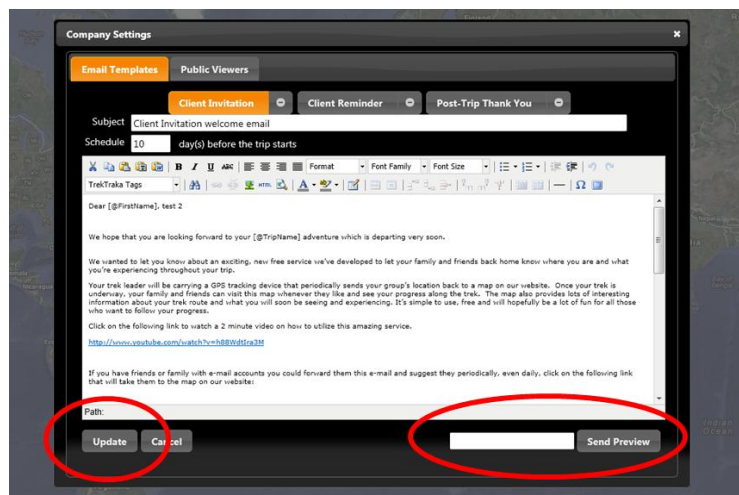

Figure 29 - Setting the Email Schedule

Some Operators may wish to use the Post Trip Thank You email as a 'call to action' – for example to invite trip clients to become friends on their company Facebook page or to invite people to stay in

touch by signing up to the operator's regular newsletter. Either approach opens the potential for on-going communications and sales opportunities. The Post-Trip Thank You e-mail can also be scheduled for dispatch a set number of days after the TripEnd date.

As changes to the e-mail are completed they should be saved by clicking the Update button on the lower-left of the editing window. Unsaved changes can be removed by clicking the Cancel button. In this instance the template will revert back to the most recently Updated version.

The formatting and appearance of a saved e-mail may be easily checked by sending the template e-mail to an e-mail address for visual checking. To do this save the template by clicking Update, then enter a valid e-mail address in the Send Preview box on the lower-right of the editing window, then click **Send Preview**. The e-mail will be sent to that address. Make any subsequent editing changes necessary.
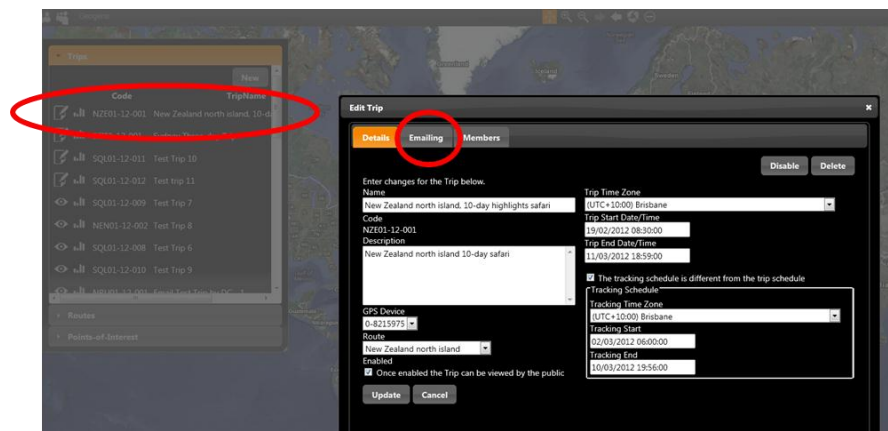

Figure 30 - Sending a Preview Email

The templates configured and saved at the Company Level flow down and become available at the Route Level for any additional editing specific to each Route.

9.6.2   Route Settings Level

For Operator personnel not provided with Administrator level access to their Operator's Portal, this will be the first level of e-mail editing available and visible on their portal interface.

In all respects, the workflow steps involved in editing the three e-mail templates at the Route level are identical to that outlined above for the Company Level in Section 9.6.1.

The ability to edit the e-mail templates at the Route level is provided because an Operator may conduct treks or tours on multiple Routes, for example, the Kokoda Track, Mount Kilimanjaro and the Everest Base Camp trek route. The TrekTraka system allows an Operator to very quickly and easily create unique e-mail templates for each Route. E-mails for different Routes may require slightly different working, however, the essential components explained above in Sections 9.3 and 9.6.1 remains the same. The result of this editing may be three sets of Route level e-mail templates, one specifically mentioning the Kokoda Track, another set mentioning Mount Kilimanjaro and another Mount Everest. This Route-level editing step can make any final editing at the Trip level either unnecessary or very simple.

Changes made to templates at the Route level flow down to become the templates available for dispatch as the Trip Level. As a result, any changes made to the templates for the Kokoda Track Route are saved and ready for dispatch for any or all subsequent Kokoda Track Trips the Operator conducts.

9.6.3   Trip Setting Level

There may be instances where an Operator needs to include some special information, unique to a specific trip, in Invitation or Post-trip e-mails. For example, a particular trip may be raising funds for a charitable organisation. In this instance the operator may want the e-mails to include mention of the charity and perhaps their logo or URL to a "donate-now" page.

Making changes to e-mail templates for a specific Trip is performed by selecting the required Trip from the Trips Control box on the left of the screen and then clicking Emailing from the Edit Trip menu screen.
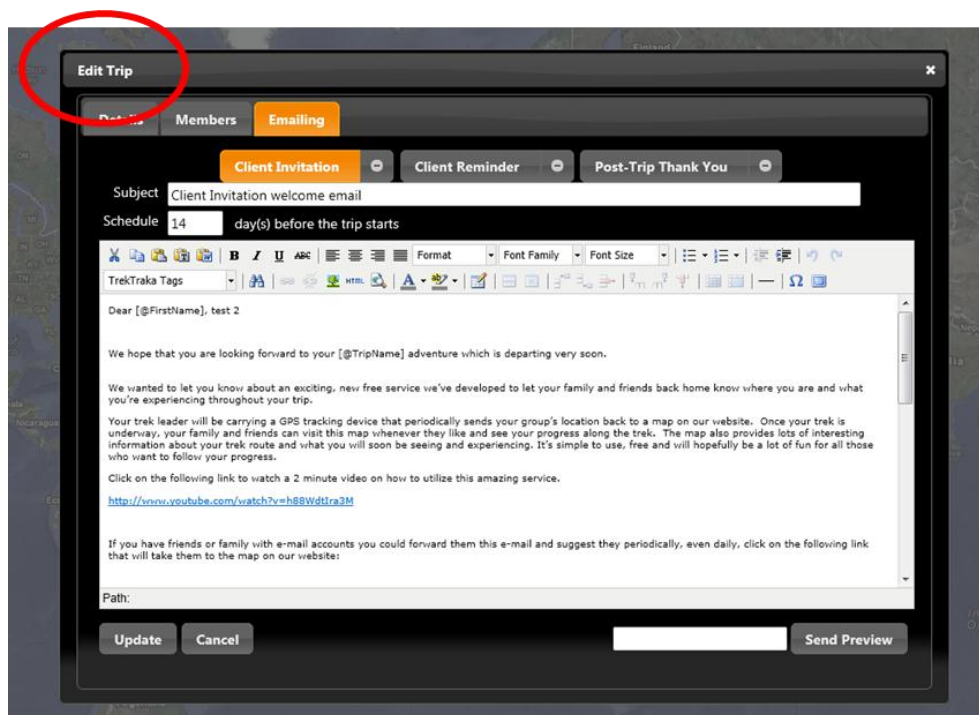

Figure 31 - Editing Email Templates for a Specific Trip

Once again, all three templates may be edited for a specific Trip – perhaps to include the name and logo of a charity sponsoring this Trip. All of the editing tools remain identical to preceding levels.

9.7   Adding Members to a Trip and Dispatching E-mails

Once an Operator has created a Trip (see Section 8 - Setting-Up Trips) the e-mail scheduling functionality begins to operate and attempts to send each of the 3 types of emails according to their respective schedules, to any people booked on the Trip who have been added to the Trip within the TrekTraka system.

Members are added to a trip using the Trip data-maintenance screen by clicking on the edit button next to the relevant Trip. Clicking on 'Members' in the Edit Trip menu opens the data-maintenance screen for adding new Members to a Trip. TrekTraka uses the term Member to denote clients an Operator will escort on a specific Trip.
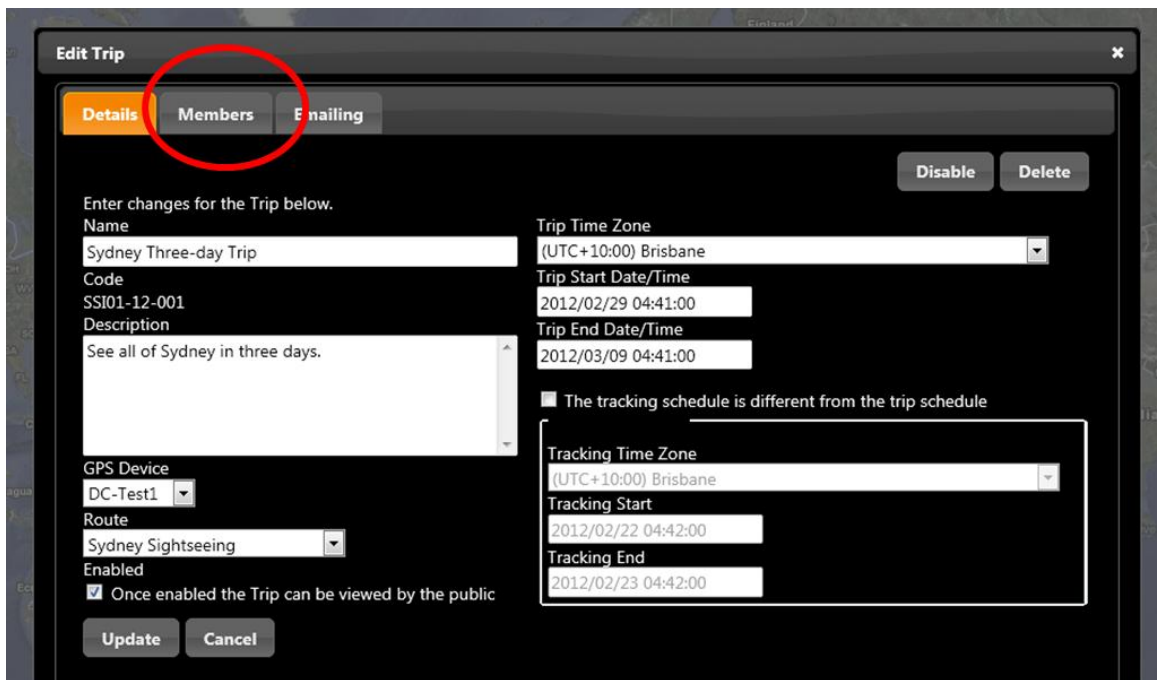

Figure 32 - Adding Trip Members

In the Members data-maintenance screen the Operator may enter the details of a new Member by clicking New and then entering the person's FirstName, LastName and Email Address, and clicking Save. This adds the person to the list of Members booked for this Trip.
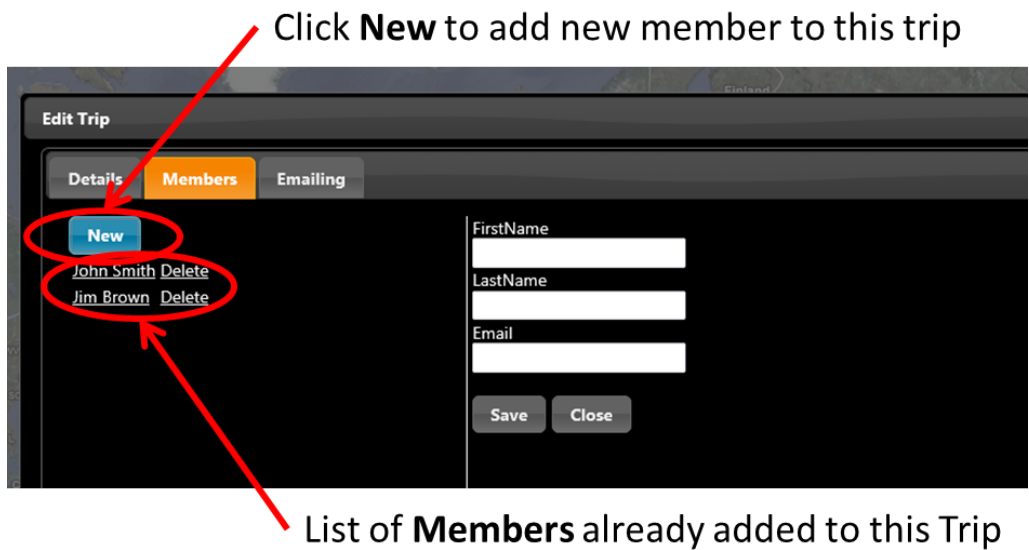
Figure 33 - Adding Trip Members

The three client e-mails for each trip (Client Invitation, Reminder, Post-Trip) are sent to only those people added as Members for a Trip.

A Trip may be created months prior to the TripStart date and Members may be added to the Trip at any time prior to, and even after, the Trip StartDate.

The three client e-mails are automatically dispatched by TrekTraka as per the Schedule set for each, perhaps 14 days prior to the Trip StartDate for the Client Invitation, 5 days prior for the Client Reminder and 3 days after Trip EndDate for the Post-Trip Thank You. No action is required of the Operator; the e-mails are all dispatched automatically according to their Schedules.

If a new member is added to a Trip after one of the invitation schedule dates has already past, TrekTraka will ask the Operator if they would like the missed invitation e-mail to be dispatched to this new member immediately. The Operator may choose to do so or decline.

9.8 Monitoring e-mail Status

As e-mails are sent to Members the status of each can be easily monitored to determine:

- Has an e-mail been **Sent** to a specific member
- Has the e-mail been **Viewed** by the trip member
- Which, if any, social media platforms the Member has **subscribed** to for their Trip
- Is the member **Enabled** for their social media accounts to receive automatic POI posts and manual post messages

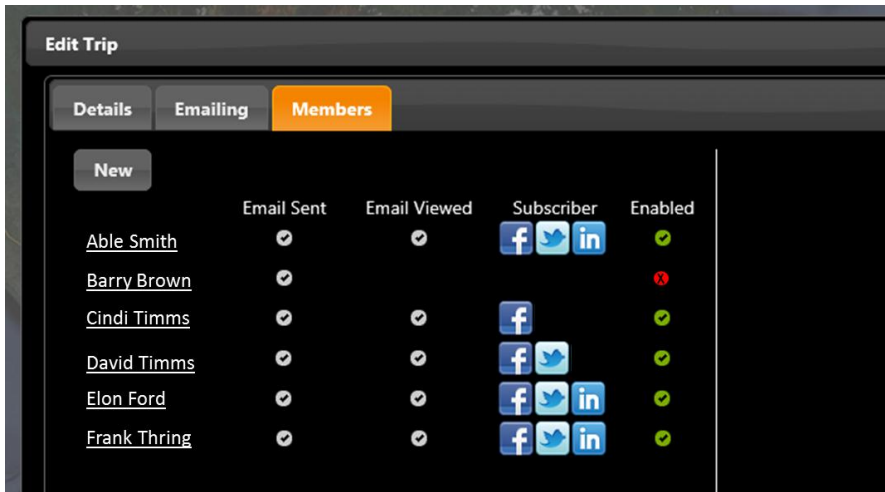The enabled button is ticked green for the member to receive social media posts on their subscribed accounts.

Figure 34 Monitor E-mail Status of Trip Members

9.9   Stop Social Media Posts to a Trip Member

There may be occasions when a Trip Member must halt their participation in a trek or tour. An injury or illness may force a member to halt their journey temporarily or perhaps abandon a trek or tour entirely. In such instances, particularly when a next-of-kin is informed, the Operator should halt the dispatch of further social media post messages to the Member's social media accounts. By clicking the green Enabled button beside a Trip member's name their social media communications link can be Disabled – the button turns red – and not further posts from the trip will be issued to their accounts. See Figure 34.

10 Trip Analytics

Operators can monitor key performance statistics from every Trip – prior to commencement, while underway, and after completion.

Trip Analytics are accessed by clicking on the Analytics icon for a trip.
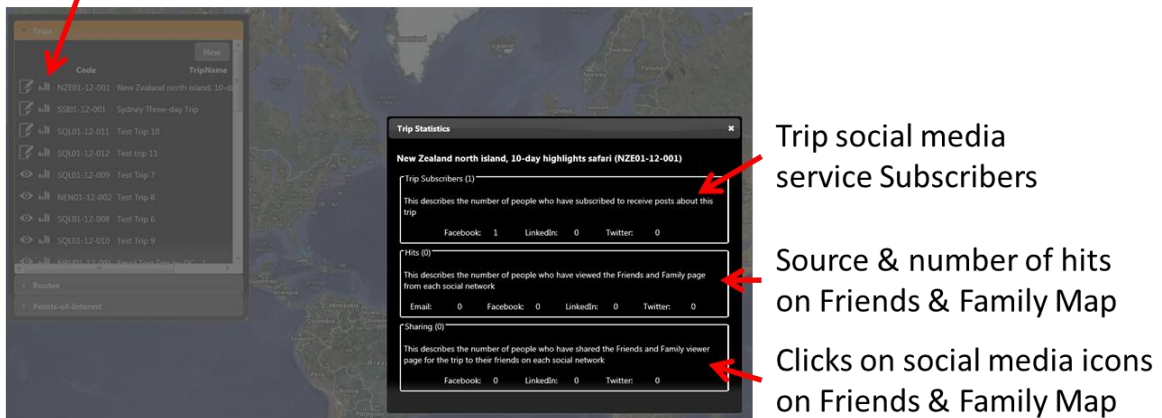
Trip Analytics icon

Figure 35 - Trip Analytics

As Client Invitation E-mails are sent to Members of a Trek or Tour the number of Social Media Subscribers to the social media service can be monitored via the **Trip Subscribers** statistics box. This shows the number of e-mail recipients that clicked on each social media icon and authorised the TrekTraka system to send periodic posts to their respective social media accounts.

The **Hits** statistics box displays progress total number of visits to the Trip's friends & Family Map and the source of the initiating link a friend or family members clicked on to be brought back to the map. The total number of Hits summed for the invitation e-mail and three social media platforms is the total number of Hits on the Friends and Family Map. These figures are refreshed frequently over the course of the Trip.

The Sharing box indicates the number of times a visitor to the Friends and Family Map has clicked on one of the social media platform icons on the top ribbon of the map.

Figure 36 - Social Media 'Sharing' of the Friends and Family Map

Each time an icon is clicked it places a single post on that visitor's respective social media account. In turn, the posts may be seen by their associated sphere of social media contacts. These contacts may also click on the link in the posts and visit the Friends and Family Map.

11 Monitoring Trip Progress

Once a Trip has commenced and the first SPOT GPS location has been received the icons beside a listed trip are highlighted in yellow to indicate the Trip is currently in progress.

The progress of a current Trip can be monitored by clicking the "eye" icon to the left of the Trip name.

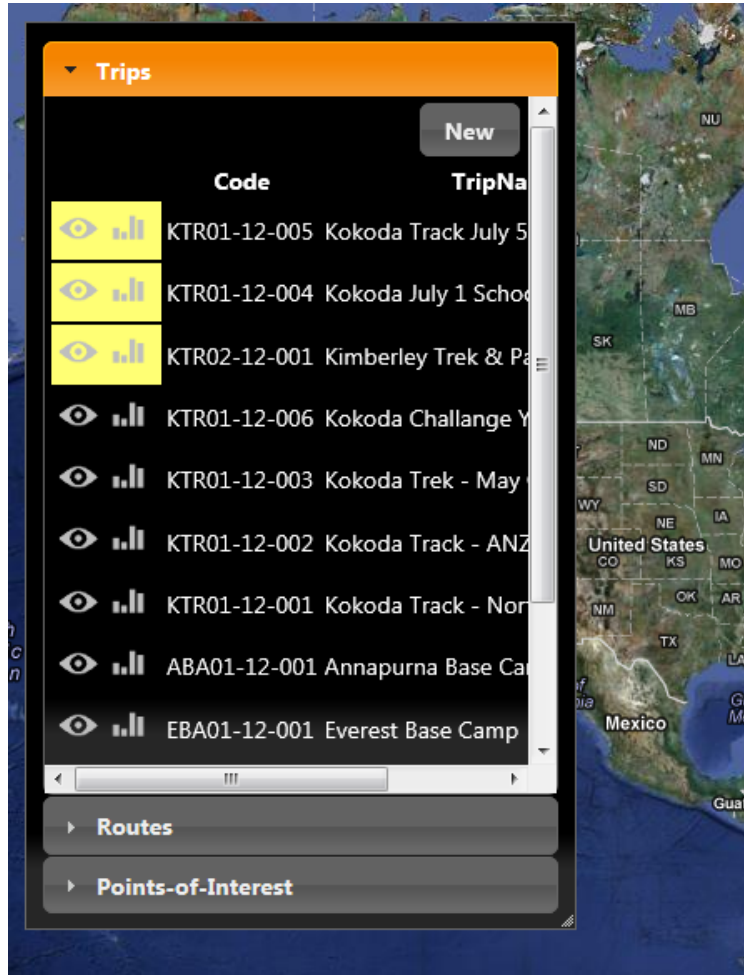This will display the GPS location points for the trip on the Operator's Portal map.

Figure 37 Trips currently in progress are highlighted in yellow

Clicking on the **Show Path** option will add the red line between GPS location points to more clearly indicate the sequence of the journey. Clicking on the **View in Company Page** option will open this Trip on the Family and friends page on the operator's website. This is the map that friends and family members will see if they click on a link in a social media update post.
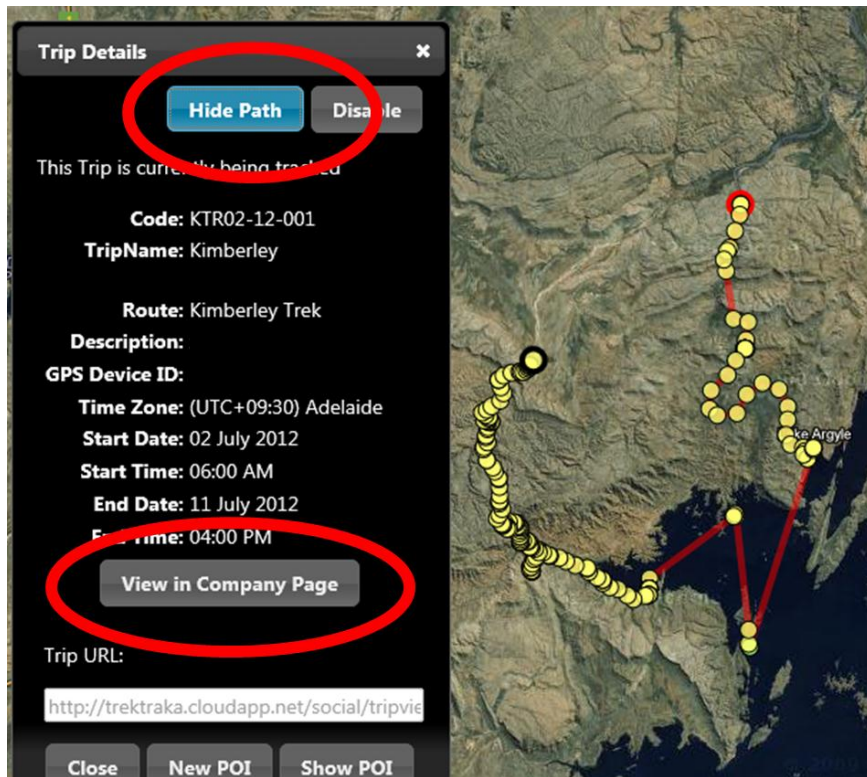
Figure 38 Show Path inserts red line linking GPS points. View in Company Page clicks through to the Family and friends Map on the operator's website
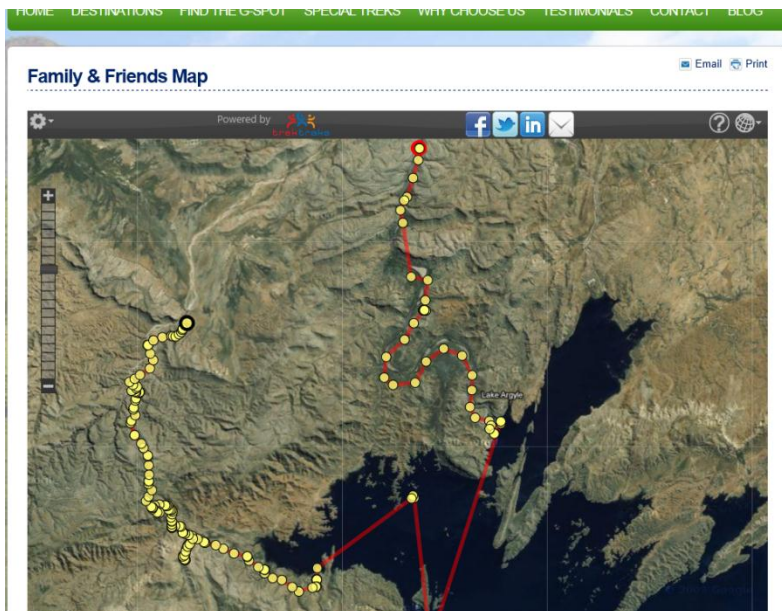

Figure 39 Map viewed in Company Page