

# Mobile - Beacon Set-Up & Management

Mobile - Getting Started

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# 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(s)

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.

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## 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.

## How Beacons Work

Beacons emit a bluetooth signal that can be received by devices. The beacons are configured to notice your app on a device as it passes through the beacon's range (strength of signal). Once the beacon 'sees' your app, it sends a signal to the website to look for notifications it needs to send, if any, as well as communicate member information into the CRM.

If you have notifications set up on the website, the site then verifies the user is located in the directory, verifies the message, and sends that message out. Before it is sent to the device, the message is first filtered through Notification Certificates, located on both Apple and Android servers. This process ensures there is no spamming or otherwise malicious intent in the message. The notification is then sent to the device.

The delivery time of a notification can vary depending on whether or not the app is 'active' - in the foreground of device - or if the app is in the background of the device. Active apps will receive messages within two seconds of sending. When the app is in the background of the device, or not active - the notification to the device is lower priority and can take up to 11 seconds to deliver. These are standard settings determined by Apple and Android that are unable to be altered.

**Warning:** Beacons placed near moving vehicles will render mixed results. The speed of the vehicle and because the vehicle is metal are both factors that play into whether or not the beacon will 'see' the device. This can result in a missed notification, or missed member display in the CRM.

The notification from front gate, for example, could also be further delayed, when the member is exiting the club in their vehicle. This

could happen when the device has a solid connection, via WIFI or LTE, and drives past the beacon. The message is created, then sent - but now the device has moved, and is now in a low, or no WIFI or LTE area. The notifications use device data to be sent to the app. If there is not a strong data connection, the message will not be delivered. Similar to browsing the web, and losing internet connection. Apple and Android then decide how long to 'hold' the message until the device is again connected to a stronger signal. We've seen these messages delayed up to twenty minutes, which is a reasonable amount of time for the message to be held until delivered. Again, Apple and Android control these timing of these types of deliveries and cannot be altered.

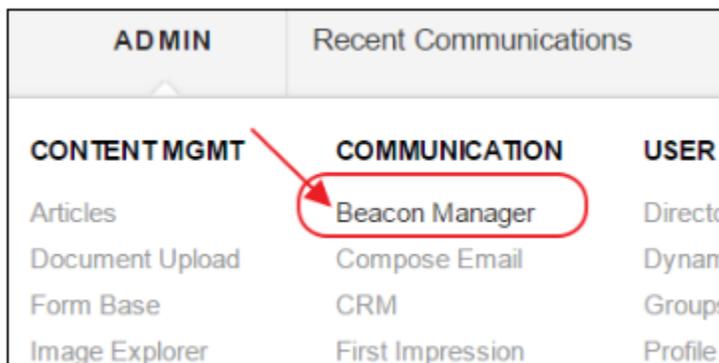
You should expect beacon notifications to work around 90-95% of the time. There are a few scenarios that affect the beacon notifications, being aware of these can help you better serve your membership.

## Beacon Zones

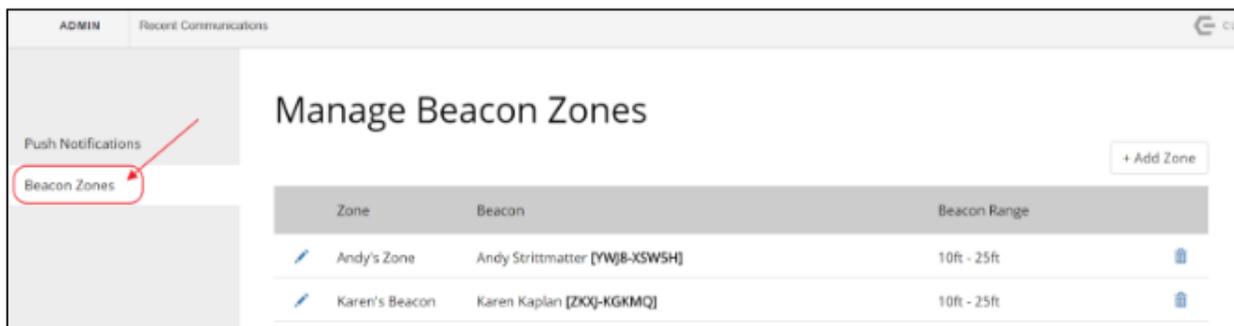
A Zone holds the beacon in a collection that associates an area of the club with the Beacon(s). A zone may contain more than one beacon, or may contain just one (more common). When defining Beacon Zones, it is important to define the why behind the zone, and answer the question what will you be triggering 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**.

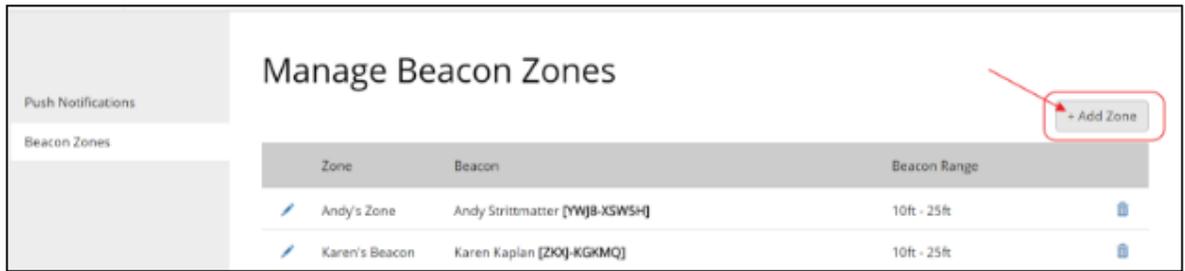


Then, click on the **Beacon Zones**.

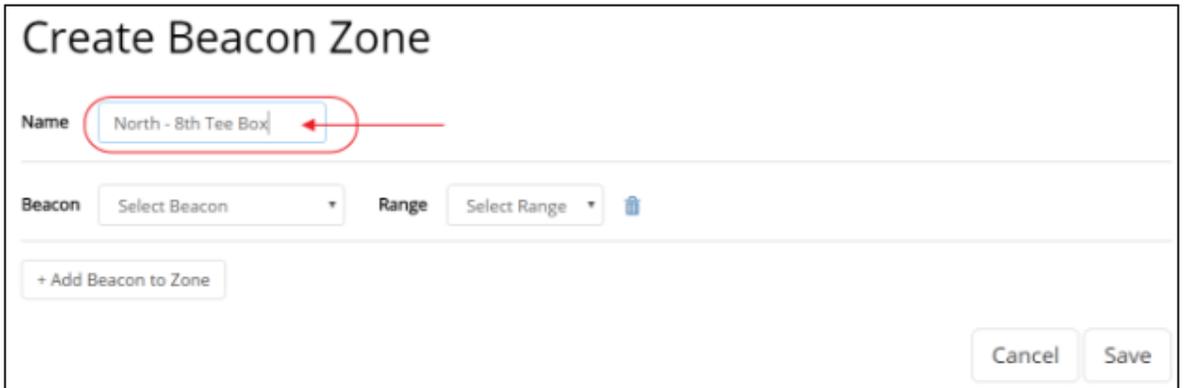


## Create a Beacon Zone

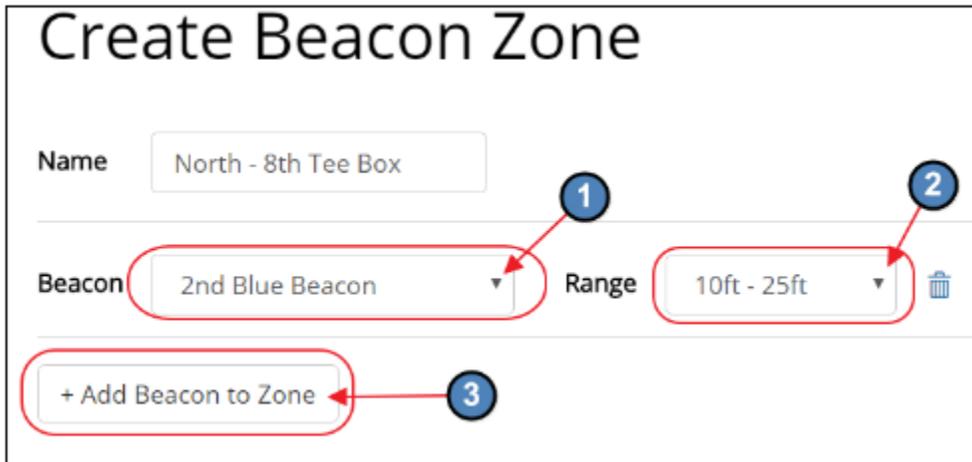
To add a new zone, click **Add Zone**.



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.

Name

---

Beacon  Range  

---

Beacon  Range  

---

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.

www.grandkeyclub.com says:  
One or more beacons are not defined. Please select the beacon ranges before saving.  
 Prevent this page from creating additional dialogs.

Name

---

Beacon  Range  

---

Beacon  Range  

---

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

### Manage Beacon Zones

Zone	Beacon	Beacon Range	
 Andy's Zone	Andy Schrammer [7928-432024]	10ft - 25ft	
 Karen's Beacon	Karen Kaplan [202-432024]	10ft - 25ft	
 Nick Wright	Nick Wright [2024-80792]	5ft - 10ft	
 North - 8th Tee Box	2nd Blue Beacon [1]	10ft - 25ft	

### 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 Sorenson (7928-424754)	10ft - 25ft	
 Karen's Beacon	Karen Kaplan (290-404442)	10ft - 25ft	
 Nick Wright	Nick Wright (2244-88798)	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

---

Beacon  Range  

### Delete a Beacon Zone

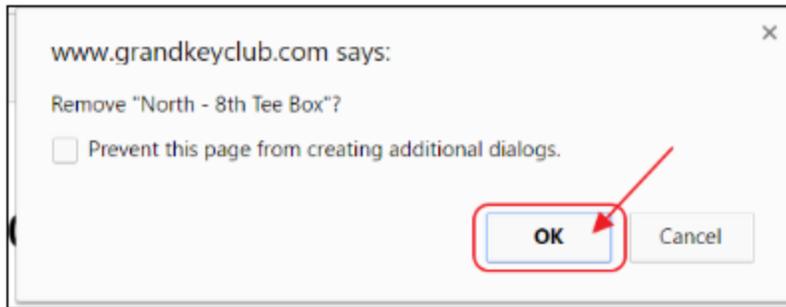
To delete a Beacon Zone, click the Trashcan icon next to the Beacon Zone to delete.

### Manage Beacon Zones

+ Add Zone

Zone	Beacon	Beacon Range	
 Andy's Zone	Andy Sorenson (7928-424754)	10ft - 25ft	
 Karen's Beacon	Karen Kaplan (290-404442)	10ft - 25ft	
 Nick Wright	Nick Wright (2244-88798)	5ft - 10ft	
 North - 8th Tee Box	2nd Blue Beacon [1]	10ft - 25ft	

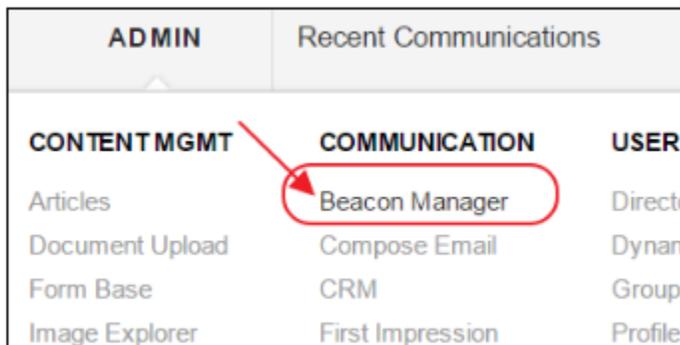
Click **OK** to confirm deletion.



## 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**.



The Create Push Notification screen will launch.

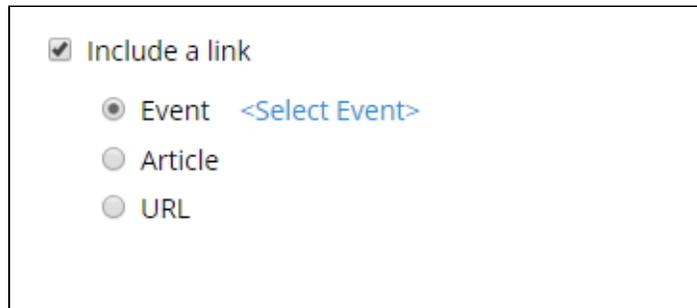
1) First, Name the Notification so that the action is identifiable.

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.

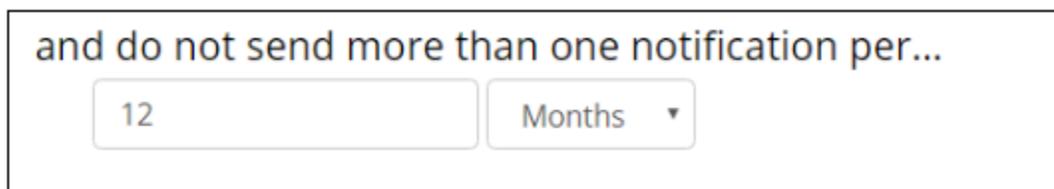
5) Optionally, opt to include a link. If checked, options will load for selection.



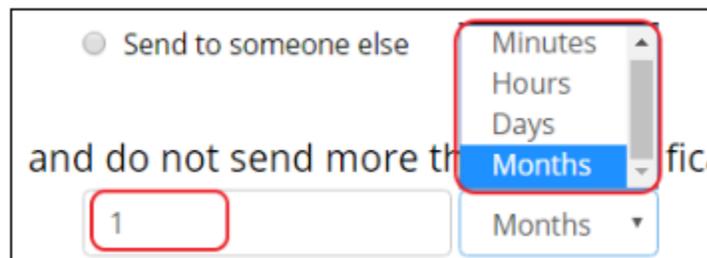
6) Define Recipients of the message. For instance, if the Member who triggers the Beacon is to receive the message, the Send to the member option should be selected. In the event someone else should receive a message (ie - Club General Manager), when Member (Board Member) triggers beacon, select Send to someone else for more options.

7) Optionally, determine the maximum number of times a member or someone else will receive this notification.

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

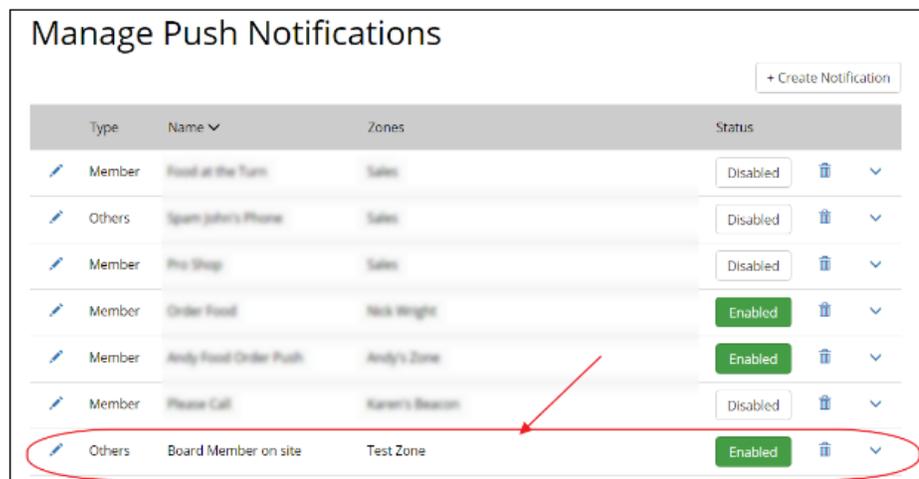


Or, any variation of times utilizing the following:



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

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



Type	Name	Zones	Status
Member	Food at the Turn	Sales	Disabled
Others	Spain 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.



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



### 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

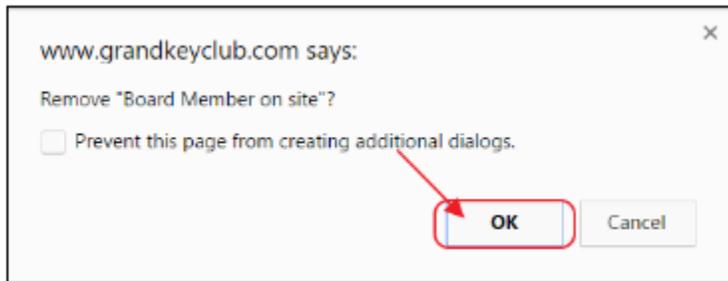
To delete a Push Notification, click the Trashcan icon next to the Push Notification to delete.

### 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	Raven's Beacon	Disabled
Others	Board Member on site	Test Zone	Enabled

Click **OK** to confirm deletion.



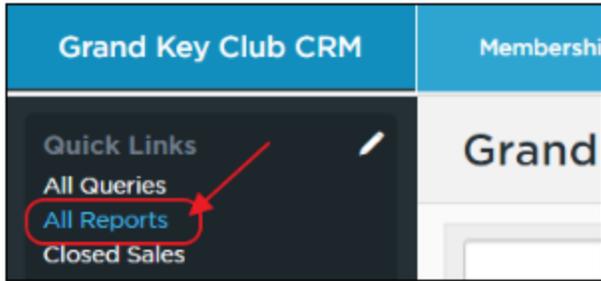
## Beacon Reporting

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.

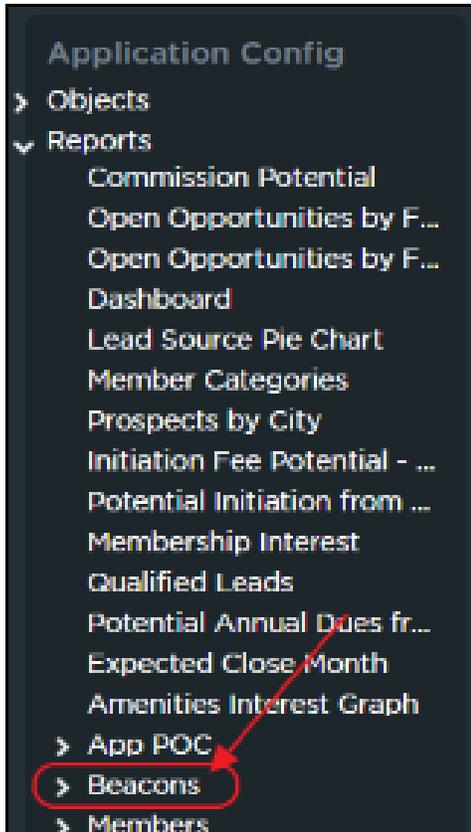
Within your Website, click on the Admin Toolbar, and navigate to your Club's CRM.

ADMIN	Recent Communication
<b>CONTENT MGMT</b>	<b>COMMUNICATION</b>
Articles	Beacon Manager
Document Upload	Compose Email
Form Base	<b>CRM</b>
Image Explorer	First Impression

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.





A user profile card for Andy Strittmatter. It features a circular profile picture of a man with a beard and a grey suit. To the right of the picture, the name "Andy Strittmatter" is displayed in bold, followed by "(1010)" in a smaller font. Below the name, two lines of text are shown: "Beer Choice: Sweetwater" and "Club Brand: Ping". On the far right of the card, the text "Just now" is visible.

If more than one Beacon is utilized for reporting purposes, select desired report from listing.



A screenshot of a web interface titled "Reports". At the top left, there is a blue button with a plus sign and the text "Add New Report". Below this is a search bar with a magnifying glass icon. The main content is a table with three columns: "Name", "Category", and "Type". The "Name" column contains several entries, each preceded by "EDIT" and "RUN" icons. A red box highlights the "RUN" icon for the first row, "Front Entrance", with a red arrow pointing to it from the search bar. The "Category" column for all rows is "Beacons", and the "Type" column for all rows is "Flow".

	Name	Category	Type
EDIT RUN	Front Entrance	Beacons	Flow
EDIT RUN	Pool Lobby	Beacons	Flow
EDIT RUN	Clubhouse Entrance	Beacons	Flow
EDIT RUN	Golf Pro Shop	Beacons	Flow
EDIT RUN	Driving Range	Beacons	Flow
EDIT RUN	Lower Patio	Beacons	Flow
EDIT RUN	Hole 1	Beacons	Flow
EDIT RUN	Hole 10	Beacons	Flow

Report results may be viewed and Exported.

<p><i>Photo Not Available</i></p>	<p><b>Member Name, (Member #)</b>          Food Allergies:          Seating/Table Preference:          Beverage Preference:          4 minutes ago</p>
<p><i>Photo Not Available</i></p>	<p><b>Member Name, (Member #)</b>          Food Allergies:          Seating/Table Preference:          Beverage Preference:          4 minutes ago</p>
<p><i>Photo Not Available</i></p>	<p><b>Member Name, (Member #)</b>          Food Allergies:          Seating/Table Preference:          Beverage Preference:          8 minutes ago</p>

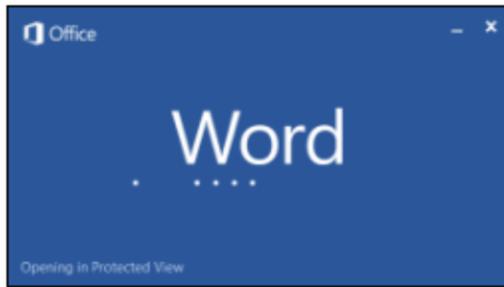
To export a report, hover over the export button.



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

1. 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.
2. 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.

## Downloadable Guide

[Beacon Set-Up Management](#)

[Back to Getting Started](#)

