

Merchandise Manager 5.0.0.1001 LOYALTY PLANS

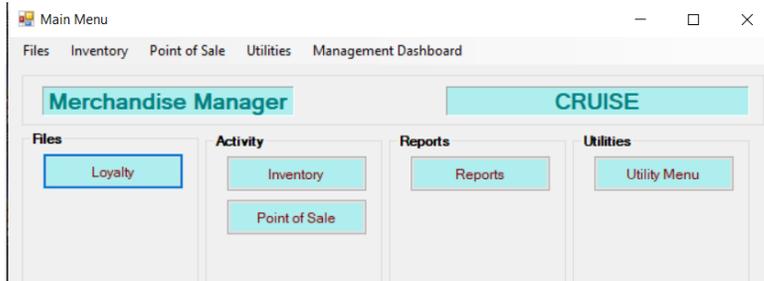
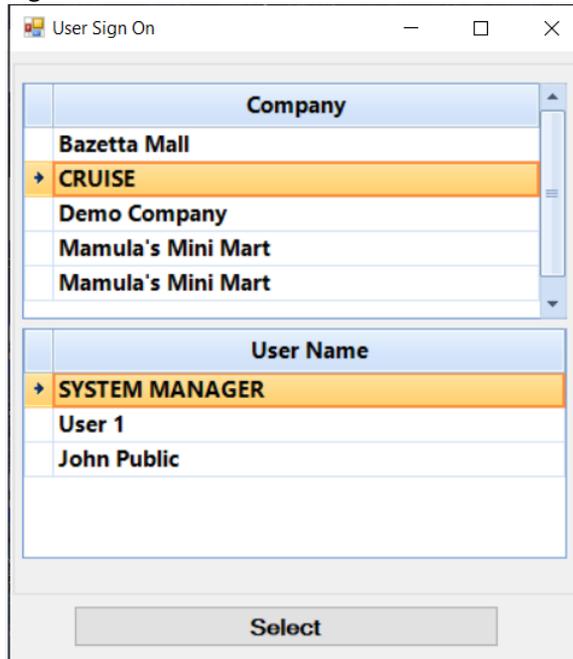
Loyalty Plans allow your customers to receive discounts or free products after they purchase a specific number of a product or spend over a specific amount of money at your store.

Loyalty Plans Setup:

Double Click the Merchandise Manager Back office Icon from the center of your desktop.

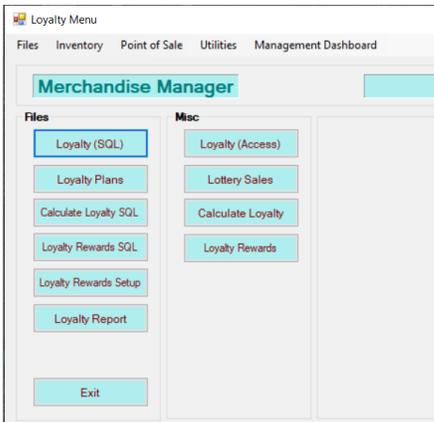


Select your company name and System Manager as the login user. Manager has special privileges. Enter a password if needed and click Log In.

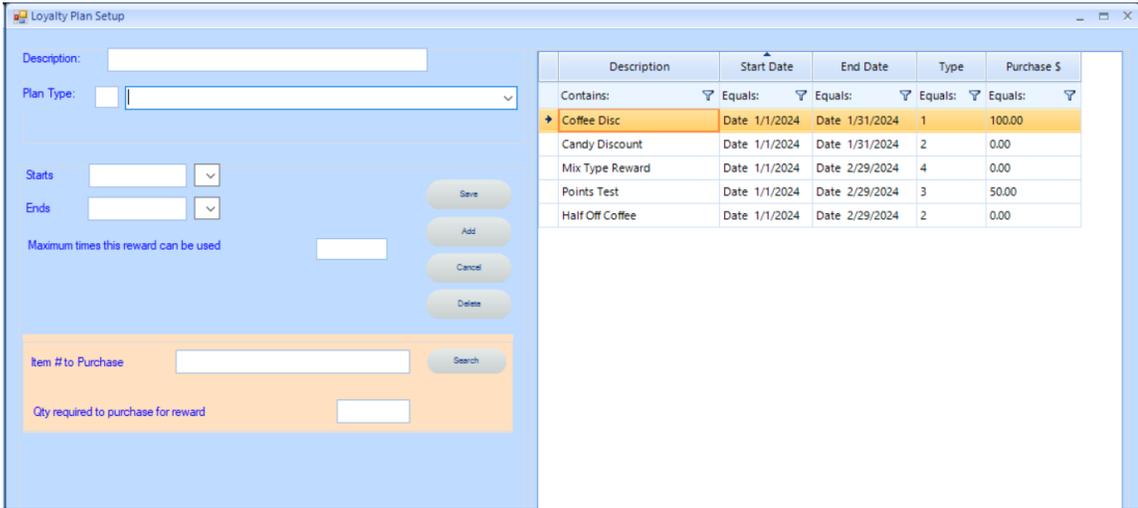


Select Loyalty from the Main Menu

Select Loyalty Plans from the Loyalty Menu

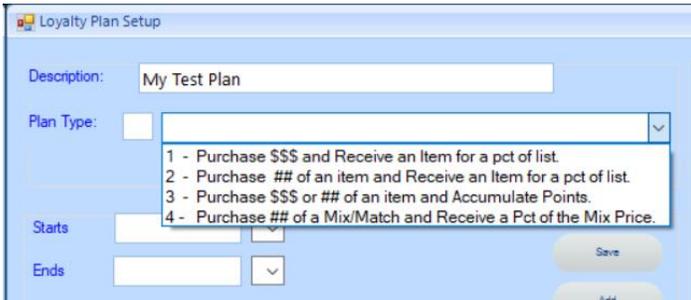


The grid on the right side of the screen will show any existing Loyalty Plans that have been created. Double click a plan to display it on the left side of the screen where it can be edited.



To create a new Loyalty Plan, Enter a description in the Description box.

Select the type of Loyalty Plan from the Plan Type drop down.



Type 1 Purchase \$\$\$ and Receive an Item for a pct of list – Customer will receive a product for free or for a percent of the list price after they spend a specific amount of money at your store.

Loyalty Plan Setup

Description:

Plan Type: 1

Starts:

Ends:

Maximum times this reward can be used:

Total Dollars in Sales to receive plan:

Item # to redeem reward:

Qty to Receive each redemption: Pct of Price: %

Enter the dates that this plan will start and end.

Enter how many times a customer redeem this reward.

Enter the Amount of money the customer must spend to receive the reward.

Next determine the product the customer will receive. Pressing Search will allow you to search your inventory and select the product. Use the normal filtering to search for specific product.

Loyalty Plan Setup

Description:

Plan Type: 1

Starts:

Ends:

Maximum times this reward can be used:

Total Dollars in Sales to receive plan:

| Description | Start Date | End Date |
|-----------------|---------------|----------------|
| Contains: | Equals: | Equals: |
| → Coffee Disc | Date 1/1/2024 | Date 1/31/2024 |
| Candy Discount | Date 1/1/2024 | Date 1/31/2024 |
| Mix Type Reward | Date 1/1/2024 | Date 2/29/2024 |
| Points Test | Date 1/1/2024 | Date 2/29/2024 |
| Half Off Coffee | Date 1/1/2024 | Date 2/29/2024 |

PO Item Search

Item_No Description VendorName QUM InactiveItem LastCost

Contains: Reeses

| | | | | | |
|--------------|--------------------------------|------------------|----|--------------------------|--|
| 03400002481 | REESES PIECES | | 18 | <input type="checkbox"/> | |
| 034000116416 | reeses pieces | | 0 | <input type="checkbox"/> | |
| 034000432905 | reeses miniature cup | | 0 | <input type="checkbox"/> | |
| 034000470563 | reeses mini unwrapped | | 0 | <input type="checkbox"/> | |
| 041000214899 | reeses peanut better ICE CREAM | | 0 | <input type="checkbox"/> | |
| 815216016703 | CLASSIC COOKIE REESES | BMH DISTRIBUTING | 8 | <input type="checkbox"/> | |

Double click the item or press Select to use that item in the loyalty plan.

Loyalty Plan Setup

Description: My Test Plan

Plan Type: 1 - Purchase \$\$\$ and Receive an Item for a pct of list

Starts: 1/1/2024

Ends: 3/31/2024

Maximum times this reward can be used: 100

Total Dollars in Sales to receive plan: 100.00

Item # to redeem reward: 034000002481
REESSES PIECES

Qty to Receive each redemption: 1 Pct of Price: 100 %

Buttons: Save, Add, Cancel, Delete

Enter how many of the product the customer will receive in the Qty to Receive each redemption field.

Enter the Pct of Price. NOTE: 0% means the product will be free.

Type 2 Purchase ## of an item and Receive an Item for a pct of list – Customer will receive a product for free or for a percent of the list price after they purchase a specified number of the same or another product.

Loyalty Plan Setup

Description: My Test Plan

Plan Type: [Dropdown menu]

Starts: [Date field]

Ends: [Date field]

Buttons: Save, Add

Dropdown menu options:

- 1 - Purchase \$\$\$ and Receive an Item for a pct of list.
- 2 - Purchase ## of an item and Receive an Item for a pct of list.
- 3 - Purchase \$\$\$ or ## of an item and Accumulate Points.
- 4 - Purchase ## of a Mix/Match and Receive a Pct of the Mix Price.

Loyalty Plan Setup

Description:

Plan Type: 2 - Purchase ## of an item and Receive an Item for a pct of list

Starts:

Ends:

Maximum times this reward can be used:

Item # to Purchase:

REESES PIECES

Qty required to purchase for reward:

Item # to redeem reward:

Item NOT ON FILE

Qty to Receive each redemption: Pct of Price: %

Enter the dates that this plan will start and end.

Enter how many times a customer redeem this reward.

Enter the Item # to purchase. Use the Search button to look for and filter the inventory.

Enter how many of this product the customer must purchase to receive the reward. (ex: 10)

Next determine the product the customer will receive. Pressing Search will allow you to search your inventory and select the product. Use the normal filtering to search for specific product.

PO Item Search

| Item_No | Description | VendorName | QUM | InactiveItem | LastCost |
|------------------------|--------------------------------|-----------------|------------|--------------------------|----------|
| Contains: 034000002481 | REESES PIECES | Contains: | Equals: 18 | <input type="checkbox"/> | Equals: |
| 034000116416 | reeses pieces | | 0 | <input type="checkbox"/> | |
| 034000432905 | reeses miniature cup | | 0 | <input type="checkbox"/> | |
| 034000470563 | reeses mini unwrapped | | 0 | <input type="checkbox"/> | |
| 041000214899 | reeses peanut better ICE CREAM | | 0 | <input type="checkbox"/> | |
| 815216016703 | CLASSIC COOKIE REESES | BMH DISTIBUTING | 8 | <input type="checkbox"/> | |

Loyalty Plan Setup

Description:

Plan Type: 2 - Purchase ## of an item and Receive an Item for a pct of list.

Starts:

Ends:

Maximum times this reward can be used:

Item # to Purchase: REESES PIECES

Qty required to purchase for reward:

Item # to redeem reward: REESES PIECES

Qty to Receive each redemption: Pct of Price: %

Buttons: Save, Add, Cancel, Delete

Enter how many of the product the customer will receive in the Qty to Receive each redemption field.

Enter the Pct of Price. NOTE: 0% means the product will be free.

Type 3 Purchase \$\$\$ or ## of an item and Accumulate Points (Future Use)

Loyalty Plan Setup

Description:

Plan Type: 1 - Purchase \$\$\$ and Receive an Item for a pct of list.
2 - Purchase ## of an item and Receive an Item for a pct of list.
3 - Purchase \$\$\$ or ## of an item and Accumulate Points.
4 - Purchase ## of a Mix/Match and Receive a Pct of the Mix Price.

Starts:

Ends:

Buttons: Save, Add

Type 4 Purchase ## of a Mix/Match and Receive a Pct of the Mix Price

Loyalty Plan Setup

Description:

Plan Type: 1 - Purchase \$\$\$ and Receive an Item for a pct of list.
2 - Purchase ## of an item and Receive an Item for a pct of list.
3 - Purchase \$\$\$ or ## of an item and Accumulate Points.
4 - Purchase ## of a Mix/Match and Receive a Pct of the Mix Price.

Starts:

Ends:

Buttons: Save, Add

Loyalty Plan Setup

Description:

Plan Type: 4

Starts:

Ends:

Maximum times this reward can be used:

Mix Match Code to Purchase:

Price:

Qty required to purchase for reward:

Redeem what percent of the Mix match Price: %

Enter the dates that this plan will start and end.

Enter how many times a customer redeem this reward.

Enter the Mix/Match code that will need purchased. Use the Search button to look for and filter the mix/match items.

Mix and Match Search

| Code | Description | Price | Group Qty | Group Price |
|---------|-----------------|---------|-----------|-------------|
| Equa... | Contains: | Equals: | Equals: | Equals: |
| 1 | Candy | 0.00 | 2 | 1.50 |
| 2 | Marlboro Disc | 0.00 | 1 | 0.15 |
| 3 | NOS2/4 | 0.00 | 2 | 0.98 |
| 4 | 2 FOR 2 COOKIES | 0.00 | 2 | 0.50 |
| 5 | MONSTER 2/4 | 0.00 | 2 | 1.14 |
| 6 | POWERAIDE | 0.00 | 2 | 0.88 |
| 8 | VASILIOS | 0.00 | 2 | 0.98 |
| 10 | Minute | 0.00 | 2 | 0.58 |
| 12 | JERKY | 0.00 | 2 | 1.98 |
| 13 | SNAPPLE 16OZ | 0.00 | 50 | 0.88 |
| 15 | CANDY | 0.00 | 2 | 0.38 |
| 16 | COPE | 0.00 | 2 | 1.00 |
| 17 | MONSTER MUSCLE | 0.00 | 2 | 0.98 |
| 18 | 7UP 20OZ | 0.00 | 50 | 0.48 |
| 19 | BAI | 0.00 | 99 | 0.78 |
| 20 | AQUAFINA | 0.00 | 2 | 1.18 |
| ... | ... | ... | ... | ... |

Double click or press select to use the Mix/Match code.

Enter how many of this Mix/Match the customer must purchase to receive the reward. (ex: 10)

Loyalty Plan Setup

Description:

Plan Type: 4 - Purchase ## of a Mix/Match and Receive a Pct of the Mix Pric

Starts:

Ends:

Maximum times this reward can be used:

Mix Match Code to Purchase:

Candy Price: 1.50

Qty required to purchase for reward:

Redeem what percent of the Mix match Price: % 0.00

Enter the Redeem what percent of the Mix match price. NOTE: 0% means the product will be free.

Redeeming Loyalty Rewards.

From the POS Sale Screen:

User: SYSTEM MAN Drawer: 1 Customer: Spartan Software Balance: \$0.00

Sales man View Sales Gift Cards Inventory Credit Cards **Loyalty** Override 18934 Management

Item No Description Save Delete
Qty Price Disc % Void Cancel

| Item No | Description | Qty | Price | Discount | UM | Amount |
|---------------|-------------|-----|-------|----------|----|--------|
| [Empty Table] | | | | | | |

Items: 0

| | | | |
|----------|--------|----------|--------|
| Subtotal | Tax | Discount | Total |
| \$0.00 | \$0.00 | \$0.00 | \$0.00 |

Past Receipt

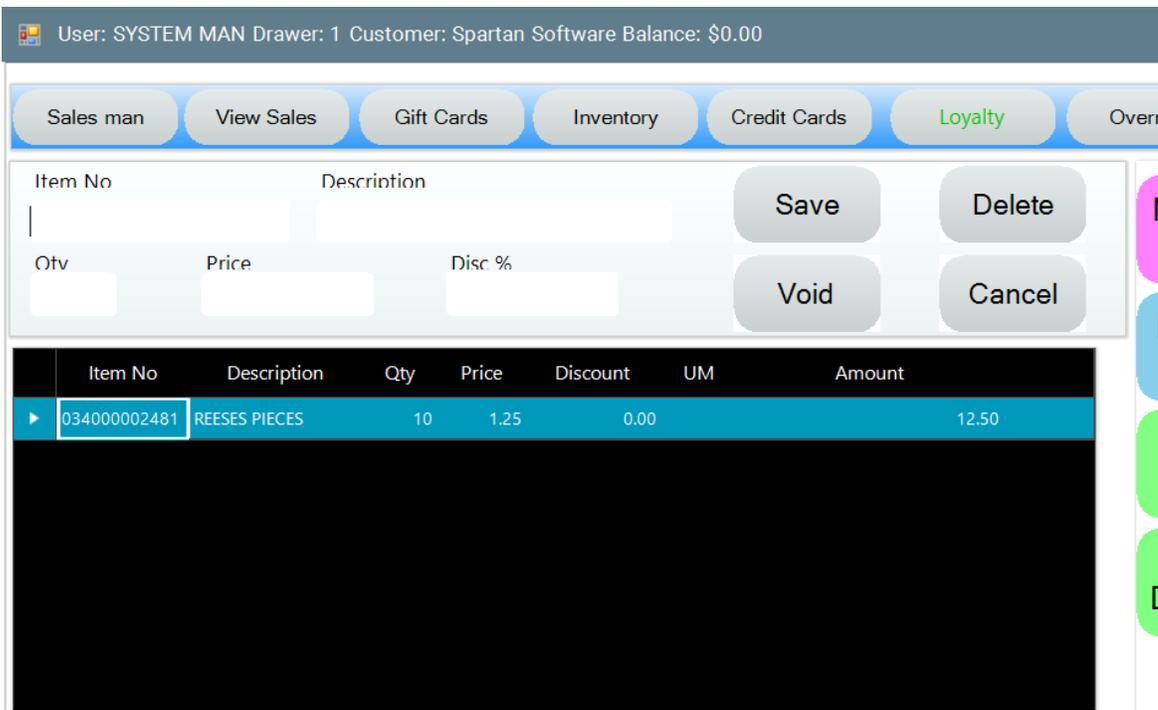
| | | | |
|------|----------------------|----------------------|----------------------|
| Sale | Total | Paid | Change |
| | <input type="text"/> | <input type="text"/> | <input type="text"/> |

Non Tax Item Misc Taxable Slushies
LOYALTY ICE AGECHCK
Save Sale Retrieve Sale DEJAVO EBT Custom...
Line Discoun... Order Discoun... CC INIT DRAWERPOP

Price Lookup

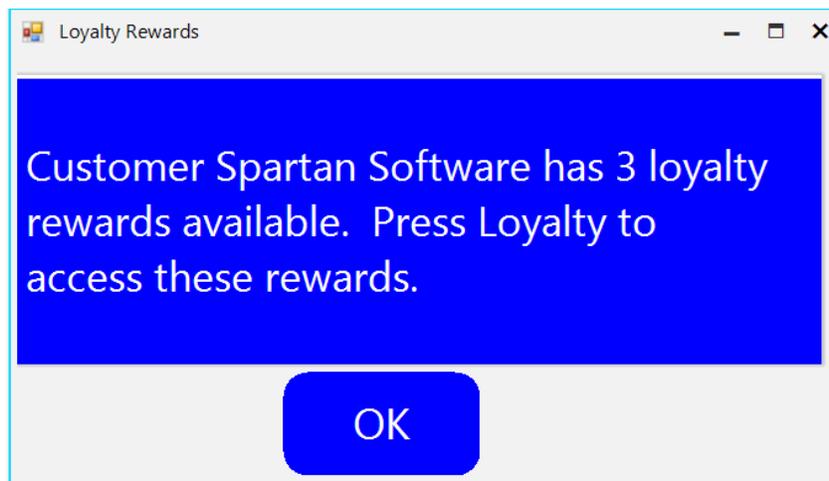
Make sure a customer is used for the sale. Use the Loyalty button, scan a loyalty card or select a customer from the Customer button.

Process sales for that customer.



The Loyalty Calculator will run once per day. So the reward will be available the following day.

When a follow up sale is started for that customer, if they have accumulated any rewards, the screen will display:

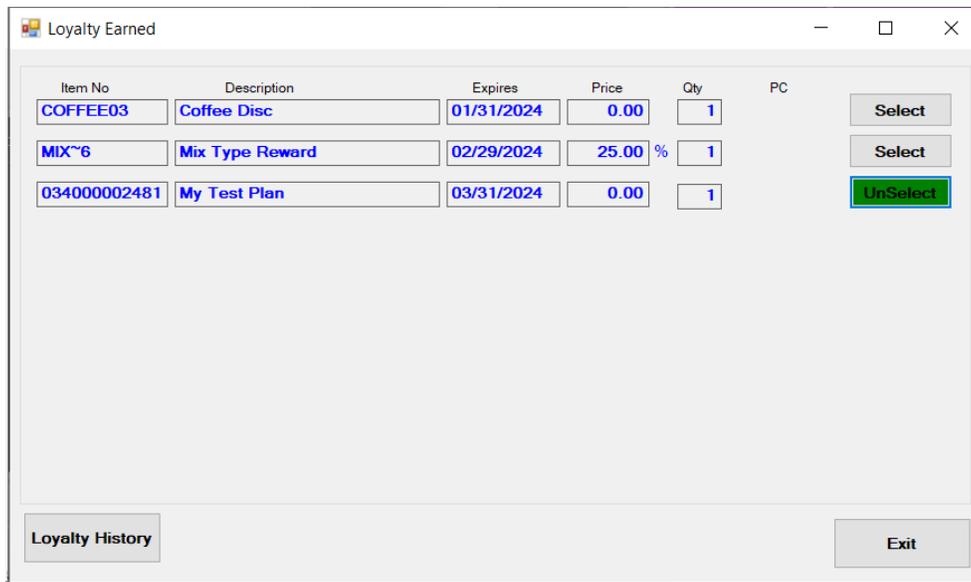


Press OK and proceed to the sale.

NOTE: the top bar will display a Loyalty button if the customer has any available.



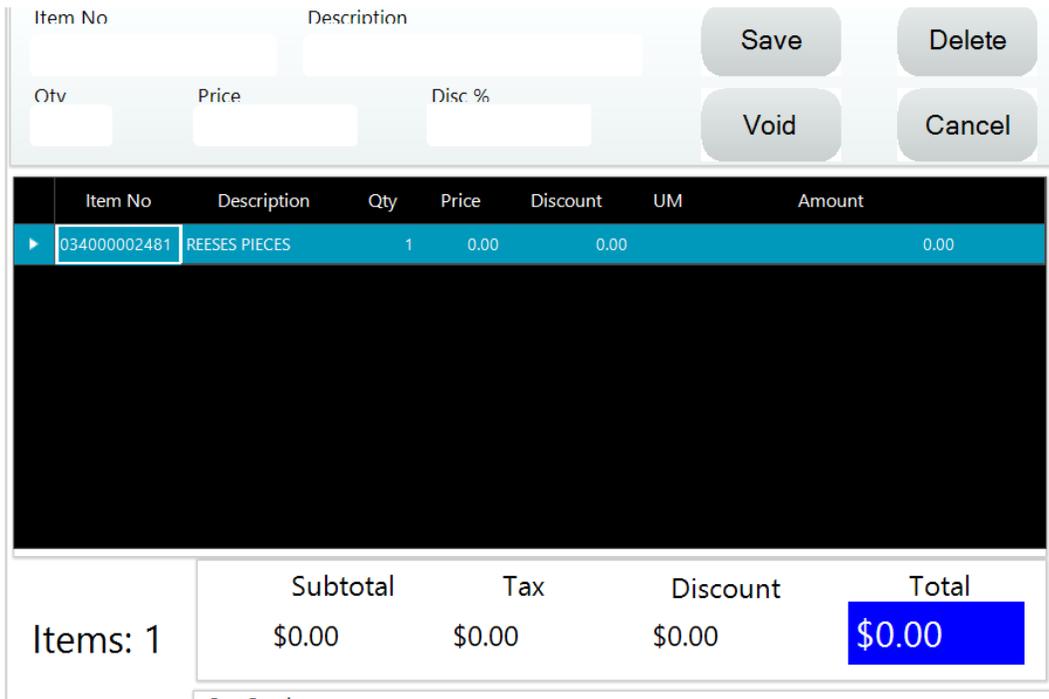
Select the loyalty button to see what is available.



Note the Loyalty we created is displayed since the customer has purchased 10 of the item.

Click the select button and that item will be moved to the current sale when Exit is pressed.

The discounted price will be used. NOTE: 0% is free.



After the sales is completed. The reward will be removed for that customer until the complete the requirements for another reward.

The Mix/Match reward will require an item with that mix/match already be on the current sale for that customer before the reward can be used.

If there are no items on the sale with that Mix/Match code, the following will display:

