



- *V8 Office User Reference*
- *ISS45 8.1.0.0-050*
- *— Promotions*
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8.1.0.0-050 Office User Reference — Promotions

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8

Promotion Management

The Promotion Management functions provide various promotion types. These promotions may be set up to suit various store requirements, or company policy. The promotions are flexible and can be used with or without loyalty schemes.

In this chapter:

Overview, page 8-3
Promotions, Reductions and Offers, page 8-4
Adding a Promotion, page 8-5
Member Promotions, page 8-12
Enhanced Promotions, page 8-21
Group Promotions, page 8-35
Level Promotions, page 8-47
Total Promotions, page 8-56
Credit Programs, page 8-56
Member Card Maintenance, page 8-64
Corema, page 8-72

Overview

The various promotion functions allow you to set up various types of promotions. These promotions may be set up to run on specific days of the week and at different times. Once you have created promotions, you can edit them.

The loyalty server handles data associated with a promotion. It can be performed locally (by ISS45) or using a centralized host system (Corema, OEM, ReMA). The loyalty server controls:

- ◆ Member Card Schemes – how points are awarded
- ◆ Card Numbers – The distributed member card numbers.
- ◆ Segments – Demographic segments assigned to the member for promotion distribution.

Note:

Member programs that issue credits (points/miles) to the customer that can be redeemed at the POS (or for catalog items) must be handled through a centralized host system.

If ISS45 is your loyalty server, you may assign up to 10 different member card schemes and maintain up to 16 segments. If you are using a centralized host system, schemes, card numbers and customer segmentation are maintained at the host and downloaded to the store. Depending on store policy, you may need to edit a promotion to:

- ◆ Correct an error
- ◆ Adjust to competitive situations that exist within your store's locality

The following options are available:

- **Promotions, Reductions and Offers** - This option enables you to link one or more items to promotions and give basic rewards.
- **Member Promotions** - This option enables you to set up more flexible and powerful member promotions.
- **Member Card Maintenance** - Use this option to set up Member Card details for customers.
- **Corema** – If Corema is your loyalty server, use this option to establish segments that can be used for promotion attachment.

Promotions, Reductions and Offers

The options here are for setting up basic promotions and rewards, or discounts. Each of these options is explained below.

Setting an item on promotion allows you to enter a specific price for an item. Setting a reduction allows you to reduce the price/percentage on an item. An offer allows you to offer an item at a discounted price if the customer buys a specified number of that item.

By setting up Promotions, Reductions and Offers, you are setting up either one of the following:

- **Single Item Promotion** - Allows you to link a single item to a promotion.
- **Multi-Item Promotion** - Allows you to link many items to a promotion.

The Promotion Management System screen lists both single and multi-item promotions, showing the following information per promotion:

- Promotion number
- Description
- Items Linked
- Start date
- End date

Buttons are provided at the top of the window to enable new promotions to be defined, and existing promotions to be edited or deleted.

Adding a Promotion, Reduction or Offer

This function enables you to add a new Promotion, Reduction or Offer. The basic options are on the left side of the dialog box; the tabbed area on the right enables you to set up Promotions, Reductions or offers.

➤ **To set up single or multi-item promotions**

- 1 Select Promotions, Reductions and Offers from the Promotion Management menu and double-click either;

- Single Item
or

- Multi Item Promotion

The Promotion Management System window is displayed.

- 2 From the Promotion Item window click *NEW*. The Promotion Item dialog box is displayed.

Insert Single Promotion Item

Promotion Number: 3
Promotion by: PLU
PLU Number: ...

General Settings
Start date: 05/08/2002 00:00
End date: 05/08/2002 23:59
Description:

Day Settings

	From	To
<input checked="" type="checkbox"/> Monday	00:00	23:59
<input checked="" type="checkbox"/> Tuesday	00:00	23:59
<input checked="" type="checkbox"/> Wednesday	00:00	23:59
<input checked="" type="checkbox"/> Thursday	00:00	23:59
<input checked="" type="checkbox"/> Friday	00:00	23:59
<input checked="" type="checkbox"/> Saturday	00:00	23:59
<input checked="" type="checkbox"/> Sunday	00:00	23:59

All On
All Off

Define start and end time for each day of the week.
Reward will be given during those hours only.

PLU Properties
Name:
Quantity / Price: /

Promotion | Reduction | Offer
Price: 0.00
Quantity: 1
Limited quantity per order:

Minimum Purchase Rules
 Minimum purchase required
Amount: 0.00
Control Check:

OK Cancel Apply

- 3 Set the following options as required.

- 4 Click *OK* or *Apply* to save.

Field	Description
Promotion Number	The number of the promotion automatically assigned by the system.
Promotion by	From the dropdown list select either: <ul style="list-style-type: none"> ▪ PLU ▪ Mix and Match Group ▪ Department
PLU Number	Enter the PLU number of the item you want to link to a promotion.
General Settings area:	
Start date	Start date of promotion.
End date	End date of promotion.
Day Settings area:	
Monday to Sunday From - To	Define start date and end time for each day of the week. Rewards will be given during those hours only.
PLU Properties area:	
Name	PLU Name
Quantity/Price	Quantity and price of the specific PLU.
Minimum Purchase	
Rules area:	
Minimum purchase required	Check this if there is a minimum amount the customer must purchase before being given a promotion.
Amount	Enter the minimum purchase amount.
Control Check	Select the control check to be triggered if minimum amount is not reached.

The Promotion Item dialog box contains three tabs, Promotion, Reduction and Offer.

Promotion Tab

Using the Promotion tab, you are able to enter a specific price for an item. For example, \$2.89 for an item that originally costs \$3.00.

Note:

Promotion prices are limited by dates (start and end) and quantities. *Nested* promotions (*a promotion within a promotion*) are also possible. A nested promotion is one which starts and ends between the start and end dates of another promotion, for the *same* item. For example: Tea is on promotion from January 1 to March 31 for \$2.99 and on a different promotion from January 15 to March 15, for \$1.99. *Overlapping* promotions are where the start and end dates of a promotion for an item “straddle” the dates for another promotion that contains the item. You will be warned if the start date or end date of a promotion is the same as an existing promotion containing the identical item. If more than one exists for the overlapping item, the most recently entered promotion will be used.

Field	Description
Price	Enter the new promotion price.
Quantity	Enter the multiple selling unit (MSU) for the reduced price. (For example, “3” if sold at a promotion price of 3 for \$2.99).

Field	Description
Limited quantity per order	Enter the total number of items that may receive the reduced price (usually a multiple of the Quantity field). (For example, "6" if sold at a promotion price of 3 for \$2.99 and you want to allow a total of 6 units sold at the discounted price).

Reduction Tab

By using the Reduction tab, you can reduce the price of an item by a specific dollar amount or percentage. For example, a \$3.00 item may be reduced by 10% or .30 cents.

Field	Description
Type	From the dropdown list, select either value (amount), or percentage (%).
Amount Off/ Percentage Off	If the reduction is a specific amount, enter the dollar amount to be deducted from the original item price. (For example, ".25" for a reduction amount off of 25 cents).
Quantity	Enter the multiple selling unit (MSU) for the reduced price. (For example, "3" if sold at a reduced promotion price of 3 for \$2.74).

Field	Description
Limited quantity per order	Enter the total number of items that may receive the reduced price (usually a multiple of the Quantity field). (For example, "6" if sold at a promotion price of 3 for \$2.74 and you want to allow a total of 6 units sold at the discounted price).

Offer Tab

Offers allow you to sell an item at a discounted price if the customer buys a specified number of that item. For example, "Buy 2, Get 1 Free", or "Buy 1, Get the Second at 1/2 Price". Offers also allow an item's discounted price to be limited. For example, item is 20% off, limit 3; or buy 2, get 1 at discount, limit to only 1 at discount. In addition, two or more items can be linked to the same offer.

The screenshot shows the 'Offer' configuration window. It has a title bar 'Offer'. Below it are several input fields: 'Type' with a dropdown menu showing 'Value', 'Amount Off' with a text box containing '0.00', 'Quantity' with a text box and the label 'at Standard Price.', another 'Quantity' with a text box and the label 'at Discount Price.', and 'Limited quantity per order' with a text box. At the bottom, there is a section titled 'Minimum Purchase Rules' containing a checkbox for 'Minimum purchase required', an 'Amount' text box, and a 'Control Check' dropdown menu.

Field	Description
Type	From the dropdown list, select either value (amount), or percentage (%).
Amount Off/ Percentage Off	Enter the dollar amount to be deducted from the original item price. Or, Enter the percentage to be deducted.
Quantity at Standard Price	Enter the number of items that must be bought before the discount takes effect.

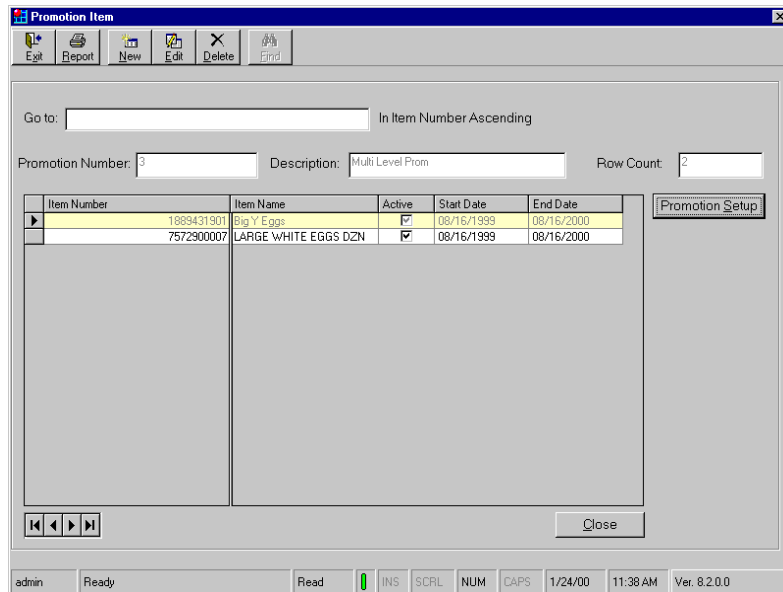
Field	Description
Quantity at Discount Price	Enter the number of items that will receive the discounted price with each additional sale.
Limited quantity per order	Enter the total number of items that may receive the reduced price (usually a multiple of the <i>Quantity at Discount Price</i> field). (For example, "Buy 2, Get Third at \$.50 Off" – set this field to 2 to allow an additional \$.50 cents off the 6 th item sold. No additional discounts will be given at this point if additional items are purchased).

Edit/Delete Promotions

The Edit / Delete Promotion option enables you to make changes or additions to single or multi-item promotions. If the promotion is current, the change takes place immediately on the PoS terminals.

➤ To edit/delete single and multi-item promotions

- 1 Select Promotions, Reductions and Offers from the Promotion Management menu. Double-click Edit/Delete Promotion; the Promotion Management System window is displayed.
- 2 Highlight the necessary promotion and double-click it, or just click *Edit*. The Promotion Item window is displayed.



The list area of the window displays existing promotions.

Note

The Promotion Setup button is used to alter an item linked to a multi-item promotion.

- 4 Highlight the relevant item and click *Delete*, to delete it.
- 5 Click *Edit* to edit the item on promotion. The Promotion Header Parameters window is displayed.
- 6 Set the following options as required.
- 7 Click *OK* or *Apply* to save.

Member Promotions

The Member Promotion options provide access to various types of promotions, which are set up specifically to loyalty customers. Member promotions can be downloaded from a host or a chain's head office in batches, or created and edited in-store.

Member Promotions can be designed to reward Member Cardholders, or customers who are not loyalty members. They are very flexible and can be defined to operate on specific days or times.

You can set up "tiered" promotions that give customers higher rewards when they buy more and more items.

Member Promotion types:

- **Enhanced Promotions** - are more flexible and powerful than Promotions, Reductions and Offers. As promotional items are scanned, rewards are applied immediately.
- **Group Promotions** - are similar to Enhanced Promotions, but include the ability to link various groups of items.
- **Level Promotions** - are similar to Enhanced Promotions, but include the ability to define up to five different levels of conditions and rewards.
- **Credit Programs** - are used to set credit reward types based on point schemes.

Reward Type Receipt Examples

The reward type used for a promotion influences what is printed on the customer's receipt. Below are examples of what the customer may see (depending upon the store's promotion and receipt parameter settings) based on the selected reward type for the promotion.

SODA & CANDY		
Diet 7-Up		\$2.99 T F
\$1.00 Cash Off 7-Up		-\$1.00
**PRICE WITH YOUR CARD	←	\$1.99
TOTAL W/EXPRESS SAVINGS		
		\$2.09
TAX-CODE	TAXABLE-VAL	TAX-VALUE
STATE TAX	\$1.99	\$0.10
BALANCE DUE		
		\$2.09
CASH		
		\$2.09
CHANGE		
		\$0.00
\$1.00 Cash Off 7-Up		-\$1.00
CLUB SAVINGS TOTAL		
		\$1.15
Total number of items sold = 1		
		\$ 1 . 0 0
O N B O N U S B U Y		

Cash Reward

SODA & CANDY		
Dr. Pepper		\$2.99 T F
10% Off Dr. Pepper		-\$0.30
**PRICE WITH YOUR CARD		\$2.69
TOTAL W/EXPRESS SAVINGS		
		\$2.84
TAX-CODE	TAXABLE-VAL	TAX-VALUE
STATE TAX	\$2.99	\$0.15
BALANCE DUE		
		\$2.84
CASH		
		\$2.84
CHANGE		
		\$0.00
10% Off Dr. Pepper		-\$0.30
CLUB SAVINGS TOTAL		
		\$0.30
Total number of items sold = 1		
		\$ 0 . 3 0
O N B O N U S B U Y		

Percentage Off Reward

SODA & CANDY		
Diet 7-Up		\$2.99 T F
Member's Discount		-\$1.40
**PRICE WITH YOUR CARD		\$1.59
TOTAL W/EXPRESS SAVINGS		
		\$1.67
TAX-CODE	TAXABLE-VAL	TAX-VALUE
STATE TAX	\$1.59	\$0.08
BALANCE DUE		
		\$1.67
CASH		
		\$1.67
CHANGE		
		\$0.00
Member's Discount		-\$1.40
CLUB SAVINGS TOTAL		
		\$1.55
Total number of items sold = 1		
		\$ 1 . 4 0
O N B O N U S B U Y		

New Price Reward

SODA & CANDY		
Diet 7-Up		\$2.99 T F
50 Cents Off		-\$0.50
**PRICE WITH YOUR CARD		\$2.49
TOTAL W/EXPRESS SAVINGS		
		\$2.61
TAX-CODE	TAXABLE-VAL	TAX-VALUE
STATE TAX	\$2.49	\$0.12
BALANCE DUE		
		\$2.61
CASH		
		\$2.61
CHANGE		
		\$0.00
50 Cents Off		-\$0.50
CLUB SAVINGS TOTAL		
		\$0.65
Total number of items sold = 1		
		\$ 0 . 5 0
O N B O N U S B U Y		

Amount Off Per Item
Reward

MEAT		
Smoked Ham		\$19.40 F
Weight Discount		-\$3.79
**PRICE WITH YOUR CARD		\$15.61
TOTAL W/EXPRESS SAVINGS		
		\$15.61
BALANCE DUE		
		\$15.61
CASH		
		\$15.61
CHANGE		
		\$0.00
Weight Discount		-\$3.79
CLUB SAVINGS TOTAL		
		\$3.79
Total number of items sold = 1		
		\$ 3 . 7 9
O N B O N U S B U Y		

New Price Per Pound
Reward

SODA & CANDY		
Diet 7-Up		\$2.99 T F
AIR MILES EARNED	10	MILES
TOTAL W/EXPRESS SAVINGS		\$3.14
TAX-CODE	TAXABLE-VAL	TAX-VALUE
STATE TAX	\$2.99	\$0.15
BALANCE DUE		\$3.14
CASH		\$3.14
CHANGE		\$0.00
CLUB SAVINGS TOTAL		\$0.15
Total number of items sold = 1		

Credits Reward

	*S.O.M.	REG.
	-----	-----
Granola	9.00	10.00
olives		4.55
BALANCE DUE		10.00
Member card savings		-3.55
Save-On-More RDEEMED PT40		
SURCHARGE 0.000%		0.00
Cash		10.00
CHANGE		0.00
Total number of items sold = 2		

CARD NO	0912150003	
MEMBER NAME:	FIRST LAST	

*Save-On-More Opening Balance		1700
*Save-On-More Points Redeemed		40
Grand Total Points		1660

Credits Redeemed
Receipt Example

```

SODA & CANDY
  Diet 7-Up                $2.99 T F

TOTAL W/EXPRESS SAVINGS    $3.14

ADDITIONAL BIG SAVINGS TODAY
*****
You got a red coin !!
*****

TAX-CODE    TAXABLE-VAL    TAX-VALUE
STATE TAX          $2.99          $0.15

BALANCE DUE                $3.14
CASH                       $3.14

CHANGE                     $0.00

CLUB SAVINGS TOTAL        $0.15

Total number of items sold = 1
    
```

Target Message
Reward

```

SODA & CANDY
  Diet 7-Up                $2.99 T F
  Diet 7-Up                $2.99 T F
  Buy 1, Get 1 Free        -$2.99
  **PRICE WITH YOUR CARD  FREE

TOTAL W/EXPRESS SAVINGS    $3.14

TAX-CODE    TAXABLE-VAL    TAX-VALUE
STATE TAX          $2.99          $0.15

BALANCE DUE                $3.14
CASH                       $3.14

CHANGE                     $0.00
Buy 1, Get 1 Free        -$2.99

CLUB SAVINGS TOTAL        $3.14

Total number of items sold = 2
      $ 2 . 9 9
      O N B O N U S B U Y
    
```

Free Item Reward

SODA & CANDY		
Diet 7-Up		\$2.99 T F
Diet 7-Up		\$2.99 T F
Diet 7-Up		\$2.99 T F
TOTAL W/EXPRESS SAVINGS		\$9.37
ADDITIONAL BIG SAVINGS TODAY		
10% Off Order		-\$0.90 T F
TAX-CODE	TAXABLE-VAL	TAX-VALUE
STATE TAX	\$8.07	\$0.40
BALANCE DUE		\$8.47
CASH		\$8.47
CHANGE		\$0.00
10% Off Order		-\$0.90 T F
CLUB SAVINGS TOTAL		\$1.05
Total number of items sold = 3		
	\$ 0 . 9 0	
O N B O N U S B U Y		

Percent Off Order
Reward

SODA & CANDY		
Diet 7-Up		
15 @	\$2.99	\$44.85 T F
\$10 Off Ticket		-\$10.00
**PRICE WITH YOUR CARD		\$34.85
TOTAL W/EXPRESS SAVINGS		\$36.59
TAX-CODE	TAXABLE-VAL	TAX-VALUE
STATE TAX	\$34.85	\$1.74
BALANCE DUE		\$36.59
CASH		\$36.59
CHANGE		\$0.00
\$10 Off Ticket		-\$10.00
CLUB SAVINGS TOTAL		\$10.15
Total number of items sold = 15		
\$ 1 0 . 0 0		
O N B O N U S B U Y		

Amount Off Order
Reward

GROCERY		
GROCERY		\$0.50 F
SODA & CANDY		
Diet 7-Up		
		\$2.99 T F
AIR MILES	EARNED 5	MINES
TOTAL W/EXPRESS SAVINGS		\$3.64
TAX-CODE	TAXABLE-VAL	TAX-VALUE
STATE TAX	\$2.99	\$0.15
BALANCE DUE		\$3.64
CASH		\$3.64
CHANGE		\$0.00
CLUB SAVINGS TOTAL		\$0.15
Total number of items sold = 2		

Credits Per Item
Reward

SODA & CANDY		
Diet 7-Up		\$2.99 T F
Less Your Price Disc		-\$0.50
**PRICE WITH YOUR CARD		\$2.49
TOTAL W/EXPRESS SAVINGS		\$2.61
TAX-CODE	TAXABLE-VAL	TAX-VALUE
STATE TAX	\$2.49	\$0.12
BALANCE DUE		\$2.61
CASH		\$2.61
CHANGE		\$0.00
Less Your Price Disc		-\$0.50
CLUB SAVINGS TOTAL		\$0.65
Total number of items sold = 1		
\$ 0 . 5 0		
O N B O N U S B U Y		

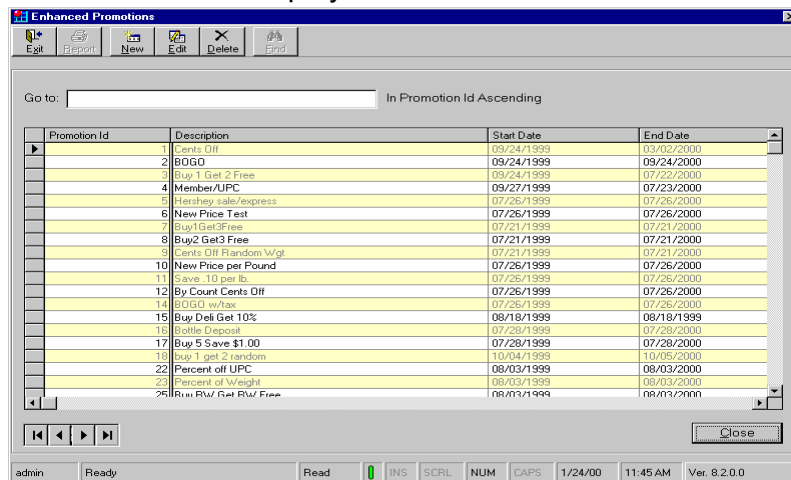
New Price Per Quantity
Reward

Enhanced Promotions

Enhanced Promotions give you more flexibility than promotions, reductions and offers. You can specify promotion start and end dates, as well as a mark down department. Customer savings, or rewards, are allocated to this mark down department. As in all promotions, customers qualify for rewards (and multiple rewards) by purchasing the quantities you specify.

➤ To Add an Enhanced Promotion

- 1 From the Promotion Management menu, select Member Promotions, and then Enhanced Promotions. The Enhanced Promotions list is displayed.



The list area of the window displays existing Enhanced Promotions.

- 2 Click the *New* button.
- 3 Enter an unused Promotion ID and press Enter.
- 4 Enter a description for the promotion and press Enter.

Note:

In most cases, the description of the promotion will appear on the receipt. Be aware that the customer will see this description below the discounted item. You can set a fixed description for all promotions using the General System Parameter "Member Card Saving Message" (located in the Store \ POST \ Presentation \ Receipt \ Regular Printing folder).

- 5 On each tab, set the properties and options as required (see *below*).
- 6 Click *OK* or *Apply* to save.

General Tab

Enhanced Promotion

Promotion ID:

Description:

General | Setting | Member Card Settings | Loyalty Server

Start date:

End date:

Day Settings

	From	To	
<input checked="" type="checkbox"/> Monday	<input type="text" value="00:00"/>	<input type="text" value="23:59"/>	<input type="button" value="All On"/> <input type="button" value="All Off"/>
<input checked="" type="checkbox"/> Tuesday	<input type="text" value="00:00"/>	<input type="text" value="23:59"/>	
<input checked="" type="checkbox"/> Wednesday	<input type="text" value="00:00"/>	<input type="text" value="23:59"/>	
<input checked="" type="checkbox"/> Thursday	<input type="text" value="00:00"/>	<input type="text" value="23:59"/>	
<input checked="" type="checkbox"/> Friday	<input type="text" value="00:00"/>	<input type="text" value="23:59"/>	
<input checked="" type="checkbox"/> Saturday	<input type="text" value="00:00"/>	<input type="text" value="23:59"/>	
<input checked="" type="checkbox"/> Sunday	<input type="text" value="00:00"/>	<input type="text" value="23:59"/>	

Define start and end time for each day of the week.
Reward will be given during these hours only.

Credit Program:

Linked Promotion:

Coupon Type:

Coupon Required:

Delayed Promotion

Non Netted Discount

Promotion Identifier:

Field	Description
Start Date	Start date and time of promotion.
End Date	End date and time of promotion.
Set Attachment	Click <i>Set Attachment</i> to link one of the following to a promotion (see <i>Set Attachment Screen</i> on page 8-25): <ul style="list-style-type: none"> ▪ Link by UPC ▪ Link by Mix and Match ▪ Link by Department ▪ Link by Manufacturer ▪ Link by Price Group ▪ Link by Segments

Field	Description
Day Settings area:	
Mon - Sun	Select the days and times on which the promotions are to run.
From - To	
Credit Program	For reward types of "Credits" and "Credits Per Item" (see <i>Setting</i> tab below) select an existing Credit Program where points/miles earned from this promotion will accrue. Or for Gas Rewards, select the existing Credit Program used to sum the earned linked promotions, print the summed rewards on the receipt, and send the reward total to the coupon table on the server.
Linked Promotion	Not Used.
Coupon Type	If a coupon is required to award this promotion, select either: <ul style="list-style-type: none">▪ One Time Only – the coupon must be scanned only once for the promotion to be eligible to be awarded multiple times.▪ One time Per Reward – a separate coupon must be scanned each time the redemption is awarded.
Coupon Required	Enter the coupon number required to be scanned to award the promotion.
Delayed Promotion	Select this checkbox if you want to delay the promotion until the <i>Total</i> key is pressed at the POS. (This feature is helpful when random weight items are attached to the promotion and you wish to wait until the end of the transaction to determine which item to award the promotion to).

Note:

For Reward Types of "Percent off order" (see below), you must check this box.

Field	Description
Non Netted Discount	Select this checkbox if the promotional amount is not deducted from department net sales. Discounts will be charged to the Mark Down Department (see <i>Setting</i> tab). Typically, manufacturers sponsor non-netted promotions and the stores are reimbursed for the promotional amount.
Promotion Identifier	Enter the symbol to print on the customer's receipt next to promotional items linked to this promotion. Note: If an item is on more than one promotion with different special characters defined, the item will be printed with the special character defined on the lowest promotion identification number.

Set Attachment Screen

The Set Attachment Screen appears when the Set Attachment button is pressed from the General tab of the Enhanced Promotion, Group Promotion and Credit Program screen. The screen displays all criteria attached to the promotion.

The screenshot shows the 'Set Attachment' window. At the top, there are fields for 'Promotion ID' (containing '1') and 'Description' (containing 'Enhanced Promo'). Below these is a table with the following data:

Item ID	Type	Description
1	PLU	Washington Apples
2	PLU	Florida Ripe Oranges

To the right of the table, there are several controls: 'Set Attachment By:' with a dropdown menu set to 'Link by UPC'; 'Filters' with a 'Link Type:' dropdown set to 'All Links'; and a 'Count' section with input fields for 'Plu' (2), 'Department' (0), 'Mix & Match' (0), 'Manufacture' (0), 'Price Group' (0), and 'Segments' (0). At the bottom, there are navigation arrows and 'Delete' and 'Close' buttons.

Items can be linked to a promotion using one or more of the following criteria:

- UPC Code
- Mix & Match Code
- Department Code
- Manufacturer Code
- Price Group
- By Segment

Note:

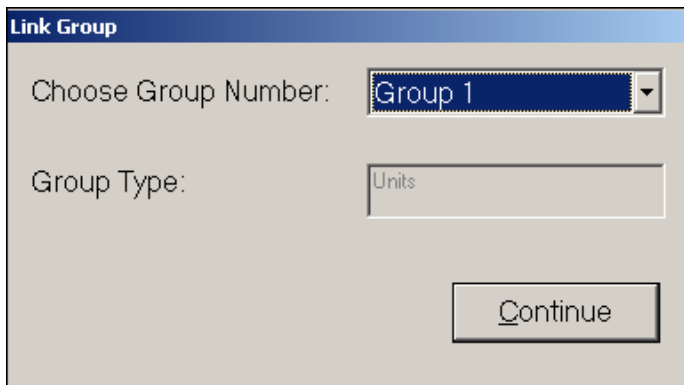
Segments that can be attached to a promotion are maintained using the Segments Maintenance screen (see *Corema Segments* on page 8-73).

The screen displays the promotion attachment count for each criterion in the lower right-hand portion of the screen. The detail

section of the screen displays the count detail based on the Link Type Filter. To set the filter to only display detail for the desired link, click the Link Type field's selection arrow and choose only the specific criteria detail you wish to display.

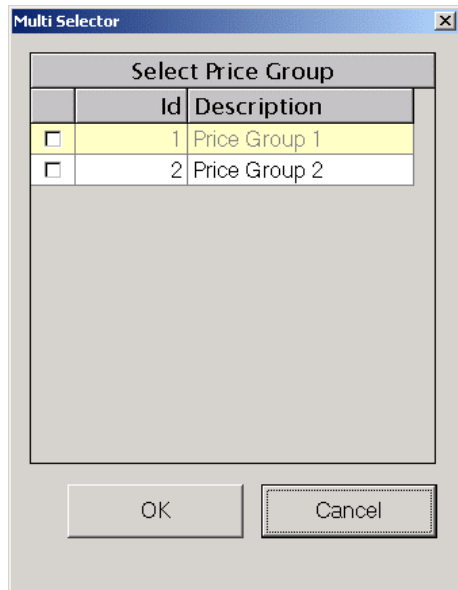
➤ **To Attach Criteria to a Promotion:**

- 1 From the Promotion's General Tab, click the *Set Attachment* button. *The Set Attachment screen displays.*
- 2 Click the *Set Attachment By* field's selection arrow and choose the criteria you wish to add to the promotion.
- 3 Click the *Ellipsis* button.
- 4 **Group Promotions Only** – Click the group selection arrow and specify the group where the criteria will be attached. Items attached to this group through specified criteria (see step 5) will be used to meet a threshold and/or be used to issue a reward:



The screenshot shows a dialog box titled "Link Group". It has two main input fields: "Choose Group Number:" with a dropdown menu showing "Group 1", and "Group Type:" with a text box containing "Units". At the bottom right, there is a "Continue" button.

- 5 Based on the criteria selected in step 2:
 - For Link by UPC – Use the PLU Item Selector to add items.
 - For Link by Mix & Match, Link by Department, Link by Price Group and Link by Segments, place a check next to the identification number.



- For Link by Manufacture, enter the manufacturer identification number.
- 6 When finished attaching criteria, click the *Close* button.

➤ **To Remove Criteria from a Promotion:**

- 1 From the Promotion's General Tab, click the *Set Attachment* button. *The Set Attachment screen displays.*
- 2 Optional – Set the Link Type filter to limit the number of detail records listed.
- 3 Highlight the record to delete and click the *Delete* button. *A confirmation screen displays.*



- 4 Click the *Yes* button. *The record is removed.*

Setting Tab

Enhanced Promotion

Promotion ID: 5

Description: SUGAR

General Setting Member Card Settings Loyalty Server

Mark Down Department: [dropdown]

Group Type: Units

Reward Type: Cash

Reward: 0.50 Give reward on: Highest Price

Reward Entered By cashiers Points Redemption Approval

Limit Quantity: 0

Minimum Purchase: 0.00

Quantity

Threshold: 1 Minimum Item Value: 0.00

2nd Threshold: 1 Minimum Item Weight: 0.000

Reward By Threshold Maximum Item Weight: 0.000

OK Cancel Apply

Field	Description
Mark Down Department	Select the department to be charged the promotion reward amount.
Group Type	Select the trigger type that determines whether threshold amounts have been met for reward purposes. The choices are: <ul style="list-style-type: none"> Units – the purchase of unit quantities Weighted/Decimal – the purchase of weight amount or decimal quantity (“liters” for example). By Value – the purchase of a dollar amount Credits – credits earned / accumulation of points by purchasing items with points attached Order Value – the total amount of the transaction

Field	Description
Reward Type	<p>Select the type of promotion reward to award the customer:</p> <ul style="list-style-type: none"> ▪ Cash – Cash off total (not per item) ▪ Percentage Off – Percent off item ▪ New Price – New price for item ▪ Amount Off Per Item – Amount off per each item ▪ Amount off Per Pound – Amount off per each pound ▪ New price per pound – New price per pound ▪ Credits – Credits/Points awarded per item ▪ Target Message – Generate target message ▪ Free Item – Issue a free item ▪ Percent Off Order – A percentage off the transaction total ▪ Amount Off Order – An amount off the transaction total ▪ Credits Per Order – Credits/Points per transaction ▪ New Price Per Quantity – New Price per item (using a new MSU) based on the following calculation: $\frac{\text{Reward Amount}}{\text{Threshold Quantity}}$ <p>Note: Keep in mind no threshold exists using a “New Price Per Quantity” reward type.</p>
Reward	<p>Based on the Reward Type chosen (above), enter the reward amount (in amount off, percent discount, new price, credit points/miles, quantity of free items, message number, etc.).</p> <p>Note: The message number must be the last digit(s) in the template files. For example, if the template name is TARGE00002, enter a “2” in this field.</p>

Field	Description
Give reward on	<p>Select either:</p> <ul style="list-style-type: none"> ▪ Highest Price ▪ Lowest Price <p>Example: Turkeys are on promotion at a specific price per pound. A customer has taken one that weighs 7lb and the other weighs 3lb. You must decide whether the higher priced turkey or lower priced turkey gets the reward.</p>
Reward Entered by cashiers	Select this checkbox if you want cashiers to be able to enter reward at POS terminal once the reward has been triggered.
Points Redemption Approval	Check this box if the promotion reward is earned by redeeming member credits (points/miles). Specify the quantity required in the "Points Required to Redeem" field under the Member Card Settings tab.
	<p>Note:</p> <p>When this box is checked the "Reward Entered By Cashiers" checkbox is unavailable and the Threshold is locked in at "1".</p>
Limit Quantity	Number of times that this promotion can be awarded within a single ticket.
Minimum Purchase	Specify the minimum-qualifying transaction purchase amount to allow the reward.
Threshold Quantity	Enter the minimum quantity, weight/decimal amount, item value, credits or order value (depending on the <i>Reward Type</i> setting) a customer must purchase or earn in order to receive the reward.

Field	Description
2nd Threshold Quantity	<p>Enter the additional quantity, weight/decimal amount, item value, credits or order value (depending on the <i>Reward Type</i> setting) a customer must additionally purchase or earn in order to receive the reward again. You can specify a higher quantity to induce the customer to make additionally purchases. Allow for an addition reward using the <i>Limit Quantity</i> field.</p> <p>Note: For “Credits” reward types, the 2nd Threshold must be set to 1, regardless of the Limit Quantity setting.</p>
Reward By Threshold	<p>Check this box to recalculate the reward amount so that once each threshold is met, the “highest” or “lowest” reward (based on the “Give reward on” setting) is selected. This setting is useful when random weight items are included in the promotion.</p> <p>Note: The reward is given in order of the items scanned and not according to the “highest” or “lowest” setting.</p>
Minimum Item Value	<p>Specify the minimum item value (of the attached items) a customer must purchase in order to receive the reward.</p>
Minimum Item Weight	<p>Specify the minimum item weight (of the attached items) a customer must purchase in order to receive the reward.</p>
Maximum Item Weight	<p>Specify the maximum item weight (of the attached items) a customer must purchase in order to receive the reward.</p>

Member Card Settings Tab

Enhanced Promotion

Promotion ID: 5

Description: SUGAR

General | Setting | **Member Card Settings** | Loyalty Server

Member Card Required 0 Points Required to Redeem

Available Card Schemes

Available for all Card Schemes

1. [] 6. []

2. [] 7. []

3. [] 8. []

4. [] 9. []

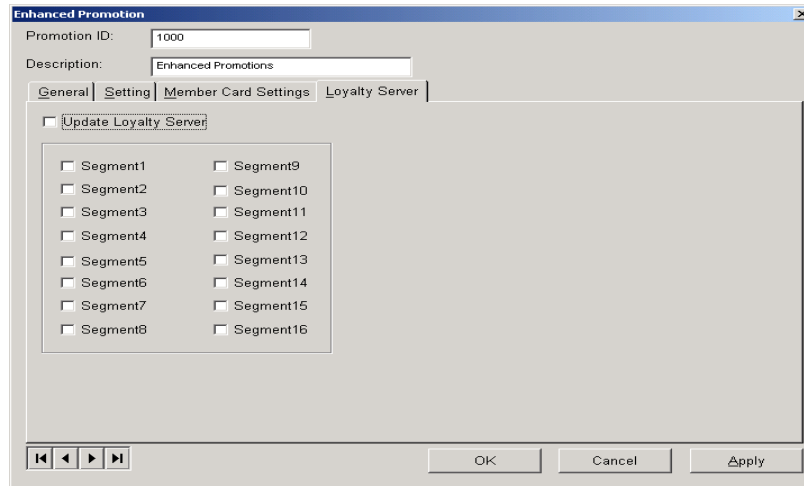
5. [] 10. []

Navigation: [] [] [] [] OK Cancel Apply

Field	Description
Member Card Required	If you want this promotion to be available to member cardholders only, select this option. If selected, you must then choose the targeted card schemes below.
Points Required to Redeem	Enter the number of points required to redeem the promotion. For example, enter "100" to be charged 100 points to receive a \$5.99 promotion item for \$2.99.
Note:	
This field is only available for "Member Card Required" promotions.	
Available Card Schemes area:	
Available for all Card Schemes	Check this box to make the promotion available to all card schemes. If not selected, then specify which of the 10 card schemes can use the promotion.

Field	Description
Schemes 1-10	Click the selection arrow for each field and select up to 10 different Card Schemes that can access the promotion.

Loyalty Server Tab



Field	Description
Update Loyalty Server	Select this checkbox if you are using a centralized loyalty server and want the promotion award information for the transaction sent back to the host. This is useful for continuity promotions where maintaining a running total of purchase history is important.

Note:

If an Enhanced Promotion (with a Group Type of “Units” or “By Value”) is flagged to “Update Loyalty Server” and a promotion progress template exists with the same last 4-digits as the promotion number, the promotion progress template will print on the customer’s receipt. Promotion Progress Templates should be named OFFPROGXXXX (where XXXX is the last 4-digits of the promotion number).

Field	Description
Segments 1-16	If ISS45 is your loyalty server, select which demographic segments to target for this promotion.

Group Promotions

Group Promotions have additional parameters and choices, allowing you to build promotions covering a wider selection of products. Group Promotions include a choice of ten group types. You can define each group with different purchase quantity requirements.

Customers qualify for rewards by purchasing the required quantities or minimum purchase amount you specify.

➤ To Add a Group Promotion

- 1 From the Promotion Management menu, select Member Promotions, and then Group Promotions. The Group Promotions list is displayed.
- 2 Click the *New* button.
- 3 Enter an unused Promotion ID and press Enter. The “Record Changed, Saved?” message appears.
- 4 Click Yes.
- 5 Enter a description for the promotion and press Enter.

Note:

In most cases, the description of the promotion will appear on the receipt. Be aware that the customer will see this description below the discounted item.

- 6 On each tab, set the properties and options as required (see *below*).
- 7 Click *OK* or *Apply* to save.

General Tab

Group Promotion

Promotion ID:

Description:

Start date:

End date:

Day Settings

	From	To	
<input checked="" type="checkbox"/> Monday	<input type="text" value="00:00"/>	<input type="text" value="23:59"/>	
<input checked="" type="checkbox"/> Tuesday	<input type="text" value="00:00"/>	<input type="text" value="23:59"/>	
<input checked="" type="checkbox"/> Wednesday	<input type="text" value="00:00"/>	<input type="text" value="23:59"/>	<input type="button" value="All On"/>
<input checked="" type="checkbox"/> Thursday	<input type="text" value="00:00"/>	<input type="text" value="23:59"/>	<input type="button" value="All Off"/>
<input checked="" type="checkbox"/> Friday	<input type="text" value="00:00"/>	<input type="text" value="23:59"/>	
<input checked="" type="checkbox"/> Saturday	<input type="text" value="00:00"/>	<input type="text" value="23:59"/>	
<input checked="" type="checkbox"/> Sunday	<input type="text" value="00:00"/>	<input type="text" value="23:59"/>	

Define start and end time for each day of the week.
Reward will be given during these hours only.

Credit Program:

Linked Promotion:

Coupon Type:

Coupon Required:

Delayed Promotion

Non Netted Discount

Promotion Identifier:

Field	Description
Start Date	Start date and time of promotion.
End Date	End date and time of promotion.
Set Attachment	<p>Click <i>Set Attachment</i> to link one of the following to a promotion (see <i>Set Attachment Screen</i> on page 8-25):</p> <ul style="list-style-type: none"> ▪ Link by UPC ▪ Link by Mix and Match ▪ Link by Department ▪ Link by Manufacture ▪ Link by Price Group ▪ Link by Segments <p>Note: When setting an attachment to a group promotion, you are first prompted to choose a group number.</p>
Day Settings area:	
Mon - Sun	Select the days and times on which the promotions are to run.
From - To	
Credit Program	For reward types of “Credits” and “Credits Per Item” (see <i>Setting</i> tab below) select an existing Credit Program where points/miles earned from this promotion will accrue.
Linked Promotion	Not Used.
Coupon Type	<p>If a coupon is required to award this promotion, select either:</p> <ul style="list-style-type: none"> ▪ One Time Only – the coupon must be scanned only once for the promotion to be eligible to be awarded multiple times. ▪ One time Per Reward – a separate coupon must be scanned each time the redemption is awarded.
Coupon Required	Enter the coupon number required to be scanned to award the promotion.

Field	Description
Delayed Promotion	Select this checkbox if you want to delay the promotion until the <i>Total</i> key is pressed at the POS. (This feature is helpful when random weight items are attached to the promotion and you wish to wait until the end of the transaction to determine which item to award the promotion to).
Non Netted Discount	Select this checkbox if the promotional amount is not deducted from department net sales. Discounts will be charged to the Mark Down Department (see <i>Setting</i> tab). Typically, manufacturers sponsor non-netted promotions and the stores are reimbursed for the promotional amount.
Promotion Identifier	Enter the symbol to print on the customer's receipt next to promotional items linked to this promotion. Note: If an item is on more than one promotion with different special characters defined, the item will be printed with the special character defined on the lowest promotion identification number.

Setting Tab

Group Promotion

Promotion ID: 1

Description:

General | **Setting** | Groups Settings | Member Card Settings | Loyalty Server

Mark Down Department: [dropdown]

Reward Type: Amount off per item

Reward: 0.20 Give reward on: Highest Price

Reward Entered By cashiers

Limit Quantity: 0

Minimum Purchase: 5.00

Minimum Item Value: 0.00

Minimum Item Weight: 0.000

Maximum Item Weight: 0.000

Navigation: [Back] [Forward] [Apply] [OK] [Cancel]

Field	Description
Mark Down Department	Select the department to be charged the promotion reward amount.

Field	Description
Reward Type	<p>Select the type of promotion reward to award the customer:</p> <ul style="list-style-type: none"> ▪ Cash – Cash off total combination total ▪ Percentage Off – Percent off reward item ▪ New Price – New price for reward item ▪ Amount Off Per Item – Amount off per combination item ▪ Amount off Per Pound – Amount off per pound (for reward item) ▪ New price per pound – New price per pound (for reward item) ▪ Credits – Credits/Points awarded for combination purchase ▪ Target Message – Generate target message for combination purchase ▪ Free Item – Issue a free reward item ▪ Percent Off Order – A percentage off the transaction total ▪ Amount Off Order – An amount off the transaction total ▪ Credits Per Item – Credits/Points per each combination item
Reward	<p>Based on the Reward Type chosen (above), enter the reward amount (in amount off, percent discount, new price, credit points/miles, quantity of free items, message number, etc.).</p> <p>Note: The message number must be the last digit(s) in the template files. For example, if the template name is TARGE00002, enter a “2” in this field.</p>

Field	Description
Give reward on	Select either: <ul style="list-style-type: none"> ▪ Highest Price ▪ Lowest Price Example: Turkeys are on promotion at a specific price per pound. A customer has taken one that weighs 7lb and the other weighs 3lb. You must decide whether the higher priced turkey or lower priced turkey gets the reward.
Reward entered by cashiers	Select this checkbox if you want cashiers to be able to enter reward at POS terminal once the reward has been triggered.
Limit Quantity	Number of times that this promotion can be awarded within a single ticket.
Minimum Purchase	Specify the minimum-qualifying transaction purchase amount to allow the reward.
Minimum Item Value	Specify the minimum item value (of the attached items) a customer must purchase in order to receive the reward.
Minimum Item Weight	Specify the minimum item weight (of the attached items) a customer must purchase in order to receive the reward.
Maximum Item Weight	Specify the maximum item weight (of the attached items) a customer must purchase in order to receive the reward.

Group Settings Tab

Group	Group Type	Threshold	Apply Reward calculation:	Fixed group for promotion:
Group 1:	Units	1	<input type="checkbox"/>	<input type="checkbox"/>
Group 2:	Units	1	<input type="checkbox"/>	<input type="checkbox"/>
Group 3:	Units	2	<input type="checkbox"/>	<input type="checkbox"/>
Group 4:	Units	0	<input type="checkbox"/>	<input type="checkbox"/>
Group 5:	Units	0	<input type="checkbox"/>	<input type="checkbox"/>
Group 6:	Units	0	<input type="checkbox"/>	<input type="checkbox"/>
Group 7:	Units	0	<input type="checkbox"/>	<input type="checkbox"/>
Group 8:	Units	0	<input type="checkbox"/>	<input type="checkbox"/>
Group 9:	Units	0	<input type="checkbox"/>	<input type="checkbox"/>
Group 10:	Units	0	<input type="checkbox"/>	<input type="checkbox"/>

Field	Description
Group Type 1- 10	<p>Select the appropriate Group type. Items attached to this group (through the Set Attachment screen – see page 8-25) will be used to meet a threshold and/or be used to issue a reward.</p> <ul style="list-style-type: none"> ▪ Units ▪ Weighted/Decimal ▪ By Value ▪ Credits ▪ Order Value

Field	Description
Threshold	<p>Enter the minimum quantity, weight/decimal amount, item value, credits or order value (depending on the <i>Reward Type</i> setting) the customer must purchase or earn to qualify for the reward.</p> <p>Example:</p> <p>If you set Group 1 to threshold quantity 2, customers must purchase at least 2 items from that group. In addition, if you allocate quantities to groups 2 to 10, customers must buy the minimum number of items from ALL 10 groups to get the reward.</p> <p>The more items you allocate to a group, the easier it becomes for customers to earn rewards.</p>
Apply Reward calculation 1-10	<p>Select this checkbox if you want the reward to apply to an item out of this specific group.</p> <p>Note:</p> <p>If the Reward Type is either Cash, Amount Off per Item, Credits, Target Message, Percent Off Order, Amount Off Order or Credits Per Item, this checkbox is unavailable. The reward is only granted in combination - when each group threshold is met.</p>

Field	Description
Fixed group for promotion 1-10	<p>Select this checkbox if you want to mark the specific group as a fixed group promotion.</p> <p>This means if this option is selected and the threshold has been met from prior purchases, the item linked to the specific group does not have to be purchased again in order to get the reward.</p>
	<p>Note:</p> <p>To use the fixed group option, you must be using a centralized loyalty server for purposes of maintaining this continuity-like program (<u>only</u> if you have to purchase the items in a fixed group over time). If all items are purchased in one ticket, you do not need a loyalty server.</p>

Member Card Settings Tab

Field	Description
Member Card Required	If you want this promotion to be available to member cardholders only, select this option. If selected, you must then choose the targeted card schemes below.
Available Card Schemes area:	
Available for all Card Schemes	Check this box to make the promotion available to all card schemes. If not selected, then specify which of the 10 card schemes can use the promotion.
Schemes 1-10	Click the selection arrow for each field and select up to 10 different Card Schemes that can access the promotion.

Loyalty Server Tab

Field	Description
Update Loyalty Server	Select this checkbox if you are using a centralized loyalty server and want the promotion award information for the transaction sent back to the host. This is useful for continuity promotions where maintaining a running total of purchase history is important.
Segments 1-16	If ISS45 is your loyalty server, select which demographic segments to target for this promotion.

Level Promotions

Level Promotions encourage customers to purchase greater quantities to earn bigger rewards. Use the five different levels to define progressively larger rewards.

Note:

If the “Delayed Promotion” flag (General Tab) is set, the reward is calculated and applied at the end of the transaction.

➤ **To Add a Level Promotion**

- 1 From the Promotion Management menu, select Member Promotions and then Level Promotions. The Level Promotions list is displayed.
- 2 Click the *New* button.
- 3 Enter an unused Promotion ID and press Enter.
- 4 Enter a description for the promotion and press Enter.

Note:

In most cases, the description of the promotion will appear on the receipt. Be aware that the customer will see this description below the discounted item.

- 5 On each tab, set the properties and options as required (see *below*).
- 6 Click *OK* or *Apply* to save.

General Tab

Level Promotion

Promotion ID:

Description:

General | **Setting** | Level Settings | Member Card Settings | Loyalty Server

Start date:

End date:

Day Settings

	From	To
<input checked="" type="checkbox"/> Monday	00:00	23:59
<input checked="" type="checkbox"/> Tuesday	00:00	23:59
<input checked="" type="checkbox"/> Wednesday	00:00	23:59
<input checked="" type="checkbox"/> Thursday	00:00	23:59
<input checked="" type="checkbox"/> Friday	00:00	23:59
<input checked="" type="checkbox"/> Saturday	00:00	23:59
<input checked="" type="checkbox"/> Sunday	00:00	23:59

Credit Program:

Linked Promotion:

Coupon Type:

Coupon Required:

Delayed Promotion

Non Netted Discount

Promotion Identifier:

Define start and end time for each day of the week.
Reward will be given during these hours only.

Field

Description

Start Date

Start date and time of promotion.

End Date

End date and time of promotion.

Set Attachment

Click *Set Attachment* to link one of the following to a promotion (see *Set Attachment Screen* on page 8-25):

- Link by UPC
- Link by Mix and Match
- Link by Department
- Link by Manufacturer
- Link by Price Group
- Link by Segments

Day Settings area:

Mon - Sun

Select the days and times on which the promotions are to run.

From - To

Credit Program

Not Used.

Linked Promotion

Not Used.

Field	Description
Coupon Type	<p>If a coupon is required to award this promotion, select either:</p> <ul style="list-style-type: none"> ▪ One Time Only – the coupon must be scanned only once for the promotion to be eligible to be awarded multiple times. ▪ One time Per Reward – a separate coupon must be scanned each time the redemption is awarded.
Coupon Required	<p>Enter the coupon number required to be scanned to award the promotion.</p>
Delayed Promotion	<p>Select this checkbox if you want to delay the promotion until the <i>Total</i> key is pressed at the POS.</p> <p>Note: Check this box to calculate reward levels at the end of the transaction.</p>
Non Netted Discount	<p>Select this checkbox if the promotional amount is not deducted from department net sales. Discounts will be charged to the Mark Down Department (see <i>Setting</i> tab). Typically, manufacturers sponsor non-netted promotions and the stores are reimbursed for the promotional amount.</p>
Promotion Identifier	<p>Enter the symbol to print on the customer's receipt next to promotional items linked to this promotion.</p> <p>Note: If an item is on more than one promotion with different special characters defined, the item will be printed with the special character defined on the lowest promotion identification number.</p>

Setting Tab

Level Promotion

Promotion ID: 1000

Description:

General | **Setting** | Level Settings | Member Card Settings | Loyalty Server

Mark Down Department: 41 - FLORAL

Group Type: Units

Reward Type: Cash

Give reward on: Highest Price

Reward Entered By cashiers

Limit Quantity: 0

Minimum Purchase: 0.00

Minimum Item Value: 0.00

Minimum Item Weight: 0.000

Maximum Item Weight: 0.000

OK Cancel Apply

Field	Description
Mark Down Department	Select the department to be charged the promotion reward amount.
Group Type	Select the measurement type that determines whether levels have been achieved for reward purposes. When a group type is chosen the first column in the Level Settings tab (see below) will change to between Quantity, Weight, Amount, Credits and Order Value. The choices are: <ul style="list-style-type: none"> Units – the quantity of units purchased Weighted/Decimal – the weight or decimal value of items purchased By Value – the amount of purchases Credits – credits / points amounts earned Order Value – the amount of the transaction

Field	Description
Reward Type	<p>Select the type of promotion reward to award the customer:</p> <ul style="list-style-type: none"> ▪ Cash – Cash off total (not per item) ▪ Percentage Off – Percent off item purchases ▪ New Price – New price for the total level quantity ▪ Amount Off Per Item – Amount off per each item ▪ Amount off Per Pound – Not Used ▪ New price per pound – Not Used ▪ Credits – Not Used ▪ Target Message – Generate target message ▪ Free Item – Issue a free item ▪ Percent Off Order – Not Used ▪ Amount Off Order – An amount off the transaction total ▪ Credits Per Item – Not Used
Reward	<p>Based on the Reward Type chosen (above), enter the reward amount (in amount off, percent discount, new price, credit points/miles, quantity of free items, message number, etc.).</p> <p>Note: The message number must be the last digit(s) in the template files. For example, if the template name is TARGE00002, enter a “2” in this field.</p>
Give reward on	<p>Select either:</p> <ul style="list-style-type: none"> ▪ Highest Price ▪ Lowest Price <p>Example: Turkeys are on promotion at a specific price per pound. A customer has taken one that weighs 7lb and the other weighs 3lb. You must decide whether the higher priced turkey or lower priced turkey gets the reward.</p>

Field	Description
Reward entered by cashiers	Select this checkbox if you want cashiers to be able to enter reward at POS terminal once the reward has been triggered.
Limit Quantity	Number of times that this promotion can be awarded within a single ticket.
Minimum Purchase	Specify the minimum-qualifying transaction purchase amount to allow the reward.
Minimum Item Value	Specify the minimum item value (of the attached items) a customer must purchase in order to receive the reward.
Minimum Item Weight	Specify the minimum item weight (of the attached items) a customer must purchase in order to receive the reward.
Maximum Item Weight	Specify the maximum item weight (of the attached items) a customer must purchase in order to receive the reward.

Level Settings Tab

Level Promotion

Promotion ID: 1000

Description:

General | Setting | **Level Settings** | Member Card Settings | Loyalty Server

	Quantity	Value	Reward
Level 1	0	0.00	0.00
Level 2	0	0.00	0.00
Level 3	0	0.00	0.00
Level 4	0	0.00	0.00
Level 5	0	0.00	0.00

Navigation: [Back] [Forward] [OK] [Cancel] [Apply]

Field	Description
-------	-------------

Level 1 - 5:	
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Field	Description
Quantity	For each level, enter the quantity, weight, amount, credits or order value (depending on the <i>Group Type</i> selected above) that must be purchased or earned in order to receive the level reward.
Value	Not Used
Reward	<p data-bbox="802 573 870 604">Note:</p> <p data-bbox="802 615 1347 646">Keep this setting at .01 if the level is used.</p> <p data-bbox="815 653 1256 716">Enter the level reward based on the following:</p> <ul data-bbox="850 726 1317 1041" style="list-style-type: none"> <li data-bbox="850 726 1263 758">▪ Cash – Cash off total purchase <li data-bbox="850 758 1235 821">▪ Percentage Off – Percent off attached item purchases <li data-bbox="850 821 1308 884">▪ New Price – New Price for quantity purchases <li data-bbox="850 884 1295 947">▪ Target Message – Message to be issued (see Note below) <li data-bbox="850 947 1317 978">▪ Free – Number of free items issued <li data-bbox="850 978 1305 1041">▪ Amount Off Order – An amount off the transaction total <p data-bbox="802 1062 870 1094">Note:</p> <p data-bbox="802 1104 1347 1220">The message number must be the last digit(s) in the template files. For example, if the template name is TARGE00002, enter a “2” in this field.</p>

Member Card Settings Tab

The screenshot shows the 'Level Promotion' dialog box with the 'Member Card Settings' tab selected. The 'Member Card Required' checkbox is unchecked. Under 'Available Card Schemes', the 'Available for all Card Schemes' checkbox is also unchecked. There are ten numbered dropdown menus (1-10) for selecting specific card schemes. The dialog includes navigation arrows and 'OK', 'Cancel', and 'Apply' buttons.

Field	Description
Member Card Required	If you want this promotion to be available to member cardholders only, select this option. If selected, you must then choose the targeted card schemes below.
Available Card Schemes area:	
Available for all Card Schemes	Check this box to make the promotion available to all card schemes. If not selected, then specify which of the 10 card schemes can use the promotion.
Schemes 1-10	Click the selection arrow for each field and select up to 10 different Card Schemes that can access the promotion.

Loyalty Server Tab

The screenshot shows a 'Level Promotion' dialog box with the following elements:

- Promotion ID:** 1000
- Description:** (empty text box)
- Tabs:** General, Setting, Level Settings, Member Card Settings, Loyalty Server (selected)
- Update Loyalty Server:**
- Segments:** A grid of checkboxes for Segment1 through Segment16.
- Buttons:** Navigation arrows, OK, Cancel, and Apply.

Field	Description
Update Loyalty Server	Select this checkbox if you are using a centralized loyalty server and want the promotion award information for the transaction sent back to the host. This is useful for continuity promotions where maintaining a running total of purchase history is important.
Segments 1-16	<p>Note:</p> <p>If a Level Promotion (with a Group Type of "Units" or "By Value") is flagged to "Update Loyalty Server" and a promotion progress template exists with the same last 4-digits as the promotion number, the promotion progress template will print on the customer's receipt. Promotion Progress Templates should be named OFFPROGXXXX (where XXXX is the last 4-digits of the promotion number).</p> <p>If ISS45 is your loyalty server, select which demographic segments to target for this promotion.</p>

Credit Programs

This option enables you to set "Credit" reward types. Credit reward types are based on points and may be redeemed at different locations other than the store and may be targeted for redemption on specific dates, points, miles, etc.

In addition to using credit programs to issue reward points, a credit program can be created to alert the cashier with a special sound effect (beep) at the PoS terminal, when a promotional item is sold. Create a credit program (e.g., Sound Effect) and link it to other promotions. See details below.

➤ To Add Credit Programs

- 1 From the Promotion Management menu, select Member Promotions, and then Credit Programs. The Credit Programs list is displayed.
- 2 Click the *New* button.
- 3 Enter an unused Promotion ID and press Enter.
- 4 Enter a description for the promotion and press Enter.
- 5 On each tab, set the properties and options as required (see *below*).
- 6 Click *OK* or *Apply* to save.

General Tab

The screenshot shows the 'Credit Program' dialog box with the 'General' tab selected. The 'Credit Program ID' field contains '9'. The 'Description' field is empty. The 'Start date' is '05/09/2002' and the 'End date' is '05/09/2002'. The 'Start time' is '00:00' and the 'End time' is '23:59'. The 'Credit Program Type' is set to 'Normal'. The 'Day Settings' section has checkboxes for Monday through Sunday, all of which are checked. The 'From' and 'To' times for each day are '00:00' and '23:59' respectively. There are 'All On' and 'All Off' buttons. A checkbox for 'Report to loyalty promotion server' is unchecked. At the bottom, there are 'OK', 'Cancel', and 'Apply' buttons.

Day	From	To
<input checked="" type="checkbox"/> Monday	00:00	23:59
<input checked="" type="checkbox"/> Tuesday	00:00	23:59
<input checked="" type="checkbox"/> Wednesday	00:00	23:59
<input checked="" type="checkbox"/> Thursday	00:00	23:59
<input checked="" type="checkbox"/> Friday	00:00	23:59
<input checked="" type="checkbox"/> Saturday	00:00	23:59
<input checked="" type="checkbox"/> Sunday	00:00	23:59

Define start and end time for each day of the week.
Reward will be given during those hours only.

Field	Description
Start Date	Start date and time of promotion.
End Date	End date and time of promotion.
Day Settings area:	
Monday - Sunday From - To	Select the days and times on which the promotions are to run.
Credit Program Type	From the dropdown list, select one of the following: <ul style="list-style-type: none"> ▪ Normal ▪ Gas Reward (Used to issue a gas coupon for a grocery purchases)
Report to loyalty promotion server	Select this if you want the credit program details sent to the Loyalty Server.

Note:

This option must be selected if you track and accumulate points at the server. The customer can then redeem points earned within an order.

Settings Tab

Credit Program

Credit Program ID:

Description:

General | **Settings** | Printing settings | Member Card Settings | Visual Effects Settings

Program Restrictions

Minimum order purchase:

Maximum credits program purchase:

Minimum credits program purchase:

Minimum credits program purchase quantity:

Convert credits

Reward Tender Type:

Event invisible on receipt Negative event

Quantity	Reward:	Price
Threshold: <input type="text" value="0"/>	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>
Step size: <input type="text" value="0"/>	Step Reward: <input type="text" value="0.00"/>	

Convert price amount

Price	Reward:	Quantity
Threshold: <input type="text" value="0.00"/>	<input type="text" value="0"/>	<input type="text" value="0"/>
Step size: <input type="text" value="0.00"/>	Step Reward: <input type="text" value="0"/>	

Navigation: [Back] [Forward] [OK] [Cancel] [Apply]

Field	Description
Program Restrictions area:	
Minimum order purchase	Enter the minimum value of the ticket total (before tax) from the linked Enhanced or Group Promotion to allow credits to accrue to this promotion.
Maximum credits program purchase	Enter the maximum dollar amount that can be purchased when using redeemed credits.
Minimum credits program purchase	Enter the minimum dollar amount that must be purchased when using redeemed credits.
Minimum credits program purchase quantity	Enter the minimum number of items that must be purchased in order to redeem credits.
Convert credits area:	Not Used.
Convert Price amount area:	Not Used.

Printing Settings Tab

Field	Description
Print on Receipt area:	
Print credit earning after every time	Select this option if you want the credit earning to print every time the reward is given.
Item credit template name	Enter the appropriate credit template name for credits earned, as set up in Database Management, POST Controls, Templates/Multi part receipts).
Print total credits earning on receipt	Select this option if you want the total credit earnings per transaction to print on the receipt at the PoS terminal.
Total credits on receipt template name	Enter the appropriate total credit template name, as set up in Database Management, POST Controls, Templates/Multi part receipts).

Field	Description
Print credits after redeemed promotion	Select this option if you want to print the reward credits used after the redeemed item.
Redeemed promotion credits template name	Enter the appropriate item redemption template name, as set up in Database Management, POST Controls, Templates/Multi part receipts).
Print on Voucher area:	
Print Voucher	Select this option if you want the reward voucher printed at the POS terminal.
Template name	Enter the reward voucher's template name. The name is alphanumeric and only capital letters are accepted.
Create/print voucher ID from	Reserved for future use.
Barcode for voucher ID	Select this option in order to print a voucher ID barcode on the receipt.
Earning details	Reserved for future use.
Redeem validation period (in days)	Enter the validation period in days.

Member Card Settings Tab

Note:

This tab is not used in Credit Program Promotions.

Field	Description
Member Card Required	If you want this promotion to be available to member cardholders only, select this option. If selected, you must then choose the targeted card schemes below.
Available Card Schemes area:	
Available for all Card Schemes	Check this box to make the promotion available to all card schemes. If not selected, then specify which of the 10 card schemes can use the promotion.
Schemes 1-10	Click the selection arrow for each field and select up to 10 different Card Schemes that can access the promotion.

Visual Effects Settings Tab

This option currently supports sound and video on selected promotions.

Field	Description
Graphic Image area:	
Display AVI or BMP Image	Select this checkbox if a video is to display on the customer display when conditions of this credit program are met. Note: Select this checkbox if this credit program is for sound effects – “Special Beep on Promotions”.
AVI/BMP file name:	Enter the path (location) and file name for the video image (\...\...\file name.html). Note: For “Special Beep on Promotions” – Enter “SOUND” (upper case letters) in this field.
Duration time for display (seconds):	Enter the number of seconds for the video to display on the customer display. Note: For “Special Beep on Promotions” – Enter “7” in this field.

Field	Description
Do not refresh customer display image during special effect.	Select this checkbox if the video (special effect) is to display in its entirety with no disruptions on the customer display.
Message Box Area:	Reserve for future use.

Member Card Maintenance

Member Card Maintenance provides access to options for setting up and maintaining Member Card schemes and monitoring Member Card customer details.

The Member Card scheme number is set up as a customer-specific member card scheme. This allows you to link a scheme different from that defined in Card Range Maintenance, for any customer, without having to re-issue them with a card.

Note

The default card scheme number and any other card schemes you require in your store are still set up as usual in Card Range Maintenance. This is in case customer details cannot be found in Member Maintenance or in the case of being offline.

Member Card Scheme Maintenance

Use the Member Card Scheme Maintenance option to add, edit or delete Member Card schemes. Member Card points are awarded to Member Card customers according to the rules you define in the schemes. Scheme number 1 is used to set the basic qualifying rules. Any other (additional) schemes you define are more customizable. At a minimum, you must establish one Member Card Scheme.

Note:

If using a loyalty server, the schemes are maintained at the server and not through ISS45. You will only need to create 1 scheme.

You can, if required, define schemes 2 and higher, to include points from scheme number 1. Scheme 2 and higher are more flexible than scheme one, and include various trigger types, receipt print options and points to award.

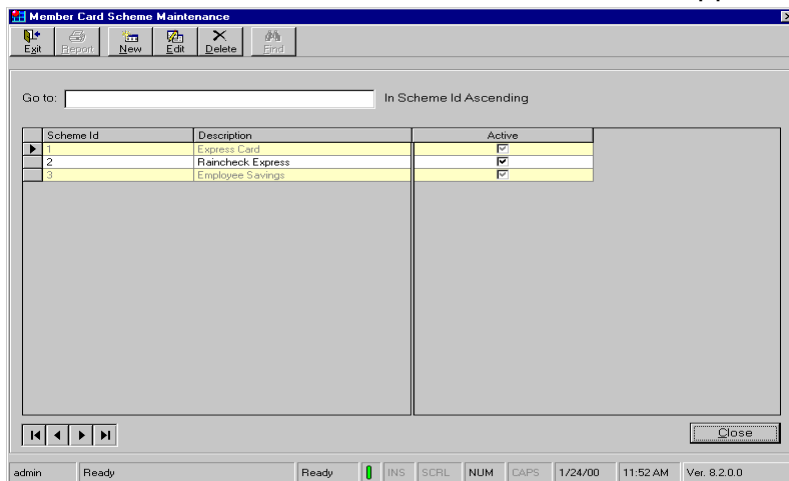
The Member Card Maintenance screen lists all the schemes defined in the system, showing the following information per scheme:

- Scheme number
- Scheme Description

- Active indicator

- **To Add Member Card Schemes**

- 1 From the Promotion Management menu, select Member Card Maintenance and then Member Card Scheme Maintenance. The Member Card Scheme Maintenance window appears.



- 2 Click *New* to add a new Member Card Scheme.
- 3 Enter the Member Card Scheme number and description.
- 4 Select the active checkbox to activate or deactivate the scheme.
- 5 Set the properties and options as required.
- 6 Click *OK* or *Apply* to save.

General Tab

Member Card Scheme Maintenance

Member Card Scheme : 100

Description : Instant Reward Active

General Settings

Receipt description :

Use frequent shopper price

Discount: 5 % Discount

Trigger type : Gets points only from current scheme

Receipt print option : Print total include additional points

Value to use : Give points for qualified spend only

Print card number

Point Factor : 0

OK Cancel Apply

Field	Description
Receipt description	Enter the schemes description to print on the receipt at the PoS terminal.
Use frequent shopper price	Select this option if you want to use frequent shopper price for the specific scheme.
Discount	Select the discount type from the dropdown list.
Trigger type	Select one of the following from the list: <ul style="list-style-type: none"> Gets points only from current scheme Get points from current + basic scheme
Receipt print option	Select one of the following from the list: <ul style="list-style-type: none"> Print total include additional points Do not print additional points Print total include additional + additional points Points for each scheme printed separately
Value to use	Select one of the following from the list: <ul style="list-style-type: none"> Give points for qualified spend only Points only for amount paid in this card Points for all amount including change

Field	Description
Print card number	To print the Member Card number on the receipt, select the checkbox.
Point Factor	Reserved for future use.

Settings Tab

Field	Description
Units Spend area:	
Threshold amount	Enter the minimum amount a customer must purchase in order to receive the reward.
Threshold points	Enter the points a customer will receive if the field threshold amount above is met.
2 nd Threshold amount	Once the threshold of 10 dollars has been reached, the customer could earn, for example, an additional 3 points for every additional cycle of 10 dollars spent. In this case, the 2 nd threshold in dollars is 10.
2 nd Threshold points	Defines the cycle after the threshold is reached.
Bonus Spend area:	
Threshold points	Enter additional threshold points.

Field	Description
Discount Member in File	For this member to receive a reward, the member's details must be in the member file.
2 nd Threshold points	Specify the cycle after the threshold is reached.
Applied from - to	Specify start and end time. Rewards are given during those hours only.
Applicable days area: Monday - Sunday	Define the days on which rewards will be given.

Member Maintenance

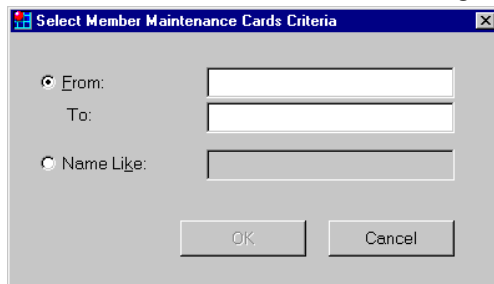
Use the Member Maintenance option to add, edit or delete Member Card customers.

Note:

If using a loyalty server, the schemes are maintained at the server and not through ISS45. You will only need to create 1 scheme.

➤ **To Add a Member Card**

- 1 From the Promotion Management menu, select Member Card Maintenance and then Member Maintenance. The Member Maintenance Cards Criteria dialog box is displayed.



- 2 Type the lowest required Member Card Number in the *From* field and the highest Member Card Number in the *To* field,
or
Type the same value in both fields, in order to search for a specific Member Card.
or
Type the Member Card Name using the *Name Like* radio button and click *OK*.
The Member Maintenance Window appears.
- Double-click the Member Card you want to edit. The tabbed Member Maintenance dialog box is displayed.
- 4 Set the parameters and options as required.
 - 5 Click *OK* or *Apply* to save.

General Tab

Member Maintenance

Member Number : 00000000000000000001 Member Name : REL

General Corema Segments

Member Card Scheme : [dropdown] Saving : 0.00

Points : 0 Panel Flag : Not defined

Update Date : 09/20/2000 Main Sort : None

Redemption Value : 0.00 Second Sort : None

Receipt by e-mail Email Address: [text box]

[Navigation buttons] [OK] [Cancel] [Apply]

Field	Description
Member Card Scheme	Select the member card scheme from the dropdown list.
Points	This field is left blank - the number of points is updated by sales from the PoS terminal.
Update Date	Select the date on which the points will be updated.
Redemption Value	This field shows the system's points-to-money equivalent.
Receipt by e-mail	Select this checkbox if member requests a copy of their receipt by e-mail.

Note:

The system parameter, *Member Card number includes a check digit*, should be turned off. (See POS Setup \POS Parameters\Card Program\Member Cards & Promotions, located in System Administration.)

Field	Description
Saving	<p>This field shows the Frequent Shoppers total savings amount. Only if the Frequent Shopper number is recognized as a Member Card number, will the savings be updated.</p> <p>If the parameter, <i>Use Frequent Shopper number a member card number</i>, is selected and Frequent Shopper is recognized as a member at the PoS terminal, the Frequent Shopper Savings amount will be recorded.</p> <p>The Frequent Shopper Savings amount is printed on the receipt. The savings amount in Member Maintenance is updated only at End of Day and not online.</p>
Panel Flag	<p>Select the appropriate option:</p> <ul style="list-style-type: none"> ▪ Not defined ▪ Homestore Customer, Non-Panel ▪ Homestore Customer ▪ Panel Customer
Main Sort	<p>Select the appropriate option:</p> <ul style="list-style-type: none"> ▪ None ▪ Department name ▪ Department name + total ▪ Item name ▪ Price ascending ▪ Price descending ▪ Department number
Second Sort	<p>Select the appropriate option:</p> <ul style="list-style-type: none"> ▪ None ▪ Alpha ▪ Price ascending ▪ Price descending
E-mail Address	<p>The member's e-mail address. This field is required for member to receive a copy of receipt by e-mail.</p>

Segments Tab

Member Maintenance

Member Number : 00000000000000000001 Member Name : REL

General Corema **Segments**

Segment 1 Segment 5 Segment 9 Segment 13
 Segment 2 Segment 6 Segment 10 Segment 14
 Segment 3 Segment 7 Segment 11 Segment 15
 Segment 4 Segment 8 Segment 12 Segment 16

Field	Description
Member Number	Enter the Member Number.
Member Name	Enter the Member Name.
Segments 1- 16	If ISS45 is your loyalty server, select the appropriate segments that identify this customer for promotion targeting.

Corema

Fujitsu's Corema is an external database that is maintained by the Head Office marketing personnel.

Customers belonging to specific segments may be rewarded with member promotions.

Corema enables you to provide data warehousing systems that collect and maintain data on your customers and their buying patterns. It also allows you to manage loyalty programs.

The Corema database stores customer-specific details and allows you to:

- Design promotions to match customer preferences

- Manage your pricing by customer, based on volume and loyalty rather than by product category
- Track and influence customers buying patterns over time
- Track who the best customers are and what their buying preferences are
- Personalize offers to fit customer needs, so that they return for more
- Carry out basket analysis to discover what customers buy (and what they don't)
- Analyze and model customer buying patterns over time

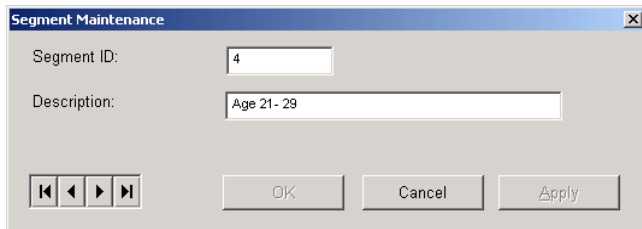
Corema Segments

If Corema is your centralized host system, use the Corema Segments program to identify groups of customers who will be targeted for specific promotions based on common factors. For example, segments could be created based on the following common characteristics:

- Age
- Sex
- Income Group
- Geographical Areas
- Pets
- Store Spend (per Customer)
- Preferred Store

➤ To set up segments

- 1 From the main menu, select Promotion Management.
- 2 Double-click Corema.
- 3 Double-click Corema Segments. The Segments Maintenance dialog box is displayed.



Segment Maintenance

Segment ID: 4

Description: Age 21- 29

Navigation buttons: Home, Left, Right, End

Action buttons: OK, Cancel, Apply

- 2 Enter the segment ID and Description.
- 3 Click *OK* or *Apply* to save.

Note:

Segments maintained here are used as promotion attachment criteria. (See Set Attachment Screen on page 8-25).

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