Logix User Manual:
UE Offer Builder

Version 6.0
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Confidentiality

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Preface

This document is a supplement to the main *Logix User Manual*. It describes how to create and manage offers for NCR's Universal Engine (UE) using Logix, the web-based interface to NCR's Advanced Marketing Solution (AMS). The UE supports sophisticated offer configurations using a range of condition and reward criteria. For additional information about AMS, visit

http://www.ncr.com/products/gm/marketing/advanced-marketing-solution

Each UE offer is broadly divided into six sections, *Summary*, *General*, *Conditions*, *Rewards, Channels, Locations* and *History*, each one accessible using the subtabs in the UE offer builder. Each section has a corresponding chapter in this document.

For an introduction to using offer builders in Logix, please see chapter 16 ("Offers") in the *Logix User Manual*.

Contents

1   Summary

Whenever you visit a UE offer in Logix, the *Offers>Summary* page is the first thing you'll see. The page collects various data from each of the subsequent pages (*General*, *Conditions*, *Rewards*, *Channels*, *Locations* and *History*) and condenses it into a single-page thumbnail that's easy to scan and absorb. These data cannot be edited from the summary page, however – you must go into each individual page to make changes.

The large rust-colored title text near the top of the page shows the offer's Logix-assigned ID and its name. The bar just below this title indicates the current status of the offer, which may be scheduled, testing, development, active, or expired; see chapter 16 ("Offers") in the main *Logix User Manual* for details.

Depending on your permissions, the summary page may also include one or more controls within the "Actions" dropdown menu near the upper right corner of the page, each described in the Actions section of this chapter.

Boxes within the body of the page summarize data editable from other pages in the offer builder, with the exception of the "Deployment" box: "Deployment" summarizes the results of offer deployment and shows when it was last attempted, when it was last successful and what the latest status was.

1.1 Actions

1.1.1 Assign folders

Much like files on a computer, offers can be organized into folders as an aid to finding and maintaining sets of offers. The "Assign folders" action opens a popup from which you can select the folders into which the offer is placed. Note that an offer needn't be in any folder, or can be in multiple folders simultaneously. See chapter 16 of the *Logix User Manual* for information about folder setup and maintenance. If a default folder for the UE engine has been specified, that folder will be automatically pre-selected when a new UE offer is created. If the user is associated with a buyer role, and the buyer role has a specified default folder, that folder will be pre-selected when a new UE offer is created. The buyer role default folder will take precedence over the UE engine default folder.

1.1.2 Copy offer

This action creates a copy of the current offer. The new offer is identical to the original, except that the phrase "Copy of" is prepended to the name.

1.1.3 Delete

To delete an offer, first ensure that it's not in use and no longer needed, then click Delete. A dialogue box will appear asking you to verify that you want to delete the offer; click Yes if you're certain.

1.1.4 Deploy

"Deploying" an offer tells the system that setup is complete and the offer is ready for use. When an offer is marked as deployed, it will be placed into an "awaiting deployment" state until the next scheduled run of the automated agent responsible for deploying the offer. Once processed by the agent, the offer will be deployed and will remain in that status until either modified or expiring.

1.1.5 Defer deployment

Deferred deployment is the same as a regular deployment, but doesn't happen immediately. Instead, deployment is deferred for a configurable length of time (one day by default). The time of day when this deferred deployment occurs is controlled by system option #51 ("Deferred deployment time").

1.1.6 Export

Offer data can be exported from Logix into an XML file, itself contained in a GZip. To do this, click the Export button and you'll be prompted to specify the path where the file should be saved.

1.1.7 Export to archive

This action becomes available if the "Export to archive" option is selected on the *Offer>General* page. It saves a copy of the offer (as XML in a GZip) to the specified path in the enterprise data warehouse. Note that when an export path is set in *Admin>Settings*, Logix will also automatically export the offer to the archive whenever the offer is successfully deployed or when the offer expires.

2   General

The following aspects of a UE offer are set and controlled from the *General* page:

- **Name** – Limited to 50 characters, the name should be both descriptive and as brief as possible. Input for translations in all available customer facing languages.
- **Description** – This optional field can hold details about the nature of the offer, its purpose, etc. Input for translations in all available customer facing languages.
- **Category** – The category is an arbitrary classification used for organizing offers. Categories are created and controlled from within the Administration section.
- **Vendor coupon code** – This field allows you to specify if the offer is associated with a particular coupon by entering a code of up to 20 characters.
- **Priority** – Priority determines which offers are exclusive of one another. Priority levels have been predefined.
- **Dates**
  - *Production* is the period when the offer is publicly available to its target customers. The production dates entered here must be in the format MM/DD/YYYY (month/day/year). Click the icon next to the input box to pick a date from a calendar.
  - *Testing* is the period during which the offer is active in testing locations
- **Localization**- Allow for selection of a currency for the offer's conditions and rewards, and unit of measure for an offer's conditions.
- **Mutual Exclusion Groups** – Mutual Exclusion Groups control offer interactions by utilizing two methods, Offer Level MEG and Item Level MEG.
- **Limits** – Limits control the frequency at which the offer is made available. For instance, you may want an offer to be available once per transaction, once per offer, or no limit at all.
- **Tiers** – A tiered offer is one that allows multiple "levels" of condition and reward, each with its own unique values. (For instance, spend $2 and get x, but spend $3 and get y.) You can select whether the offer is tiered and, if so, how many tiers it should contain. NCR recommends three to four tiers as the practical limit.
- **Inbound/outbound** – The inbound/outbound box indicates where the offer originated and where outbound data from the offer will be sent. For instance, an offer generated in Logix will say "Creation source: Logix", and may be configured to send data to Teradata CRM. This box also includes a selector that allows you to specify the vendor against which this offer should be charged. Vendors appearing in this list are configured in the Administration section of Logix.
- **Employee filtering** – Enabling employee filtering will cause the offer to be available only to employees or only to non-employees. The determination of whether or not a customer is an employee is based on information from the customer's account.
- **Discount evaluation** – The discount evaluation box indicates how the discounts earned will be evaluated.
  - **HIGO** uses items from highest value to lowest value; the highest priced items receive the discount.
  - **LOGO** uses items from lowest value to highest value; the lowest priced items receive the discount.

▪ **BOGO** uses items from highest value to lowest value; the lowest priced items receive the discount.
The **BOGO** option on the general tab is used for true buy one get one offers and requires the item limit for the discount reward to be equal or less than the product condition.   The Logix interface requires you to meet the criteria prior to it being deployed.

Please see the diagram below for an example of how each discount evaluation is used:

- **Advanced options**
  - o **Auto-transferable**—Ticking this checkbox will allow the offer to be transferable in instances where an offer has to be transferred from an individual customer to a household.
  - o **Display on web kiosk** – Ticking this checkbox will allow the offer to be shown on in-store kiosks. These kiosks, normally computer stations with touchscreens, are sites at which customers can receive information about the offers they're eligible to receive.
  - o **Defer evaluation until end of sale** – Ticking this checkbox causes the offer not to be applied until the end of a transaction.
  - o **Export to archive** – Ticking this checkbox enables the "Export to archive" option on the *Offers>Summary* page.
  - o **Favorites** – The "Favorite for all users" button allows you with a single click to mark the offer as a favorite for all Logix users. (When marked as a favorite, the offer will appear preferentially in the offers list in customer inquiry.) If you want to mark the offer as a favorite for only a certain set of users, click the user symbol to launch the *Offers>Favorites* popup.

| Logix | Offers | Customers | Products | Programs | Graphics | Locations | Admin | EPM |

| Offers | Templates | Summary | General | Conditions | Rewards | Channels | Locations | History |

Offer #6: UE Sample Offer

Save

Identification

ID: 6
External ID: None (Generate external ID)
ROID: 6
Engine: UE
Status: Expired

Name:
UE Sample Offer

Description:

(Description is limited to 1000 characters)
Category:
Testing

Vendor coupon code:

Priority

Select Offer Priority: 1

Dates

Production :
11/12/2013 to 11/12/2013 (M/d/yyyy)

Testing :
11/12/2013 to 11/12/2013 (M/d/yyyy)

Localization

Currency:
US Dollars (USD)

Mutual exclusion groups

Manage mutual exclusion groups

Limits

Reward :
Type: Per transaction
Limit: 1

Tiers

Number of tiers (1 to 4): 1

Inbound/Outbound

Creation source :
Logix

Send outbound data to :
No external interface

Chargeback vendor :
None

Employees

☐ Employee filtering
  ○ Available to employees only
  ○ Not available to employees

Discount evaluation

● LOGO   ○ HIGO   ○ BOGO

Advanced options

☑ Auto-transferable
☐ Defer evaluation until EOS
☐ Export to archive

Favorite for all users

3   Conditions

Offers rely on conditions to determine when to give rewards. For instance, an offer that rewards a customer with 10% off their basket may be conditional on a customer from a particular group first buying 10 private label items. Offers can be controlled by several separate types of conditions: customer, product, points, stored value, instant win, tender, time, day, trigger codes, preferences and opt-in conditions. Each one is fully described later in this section.

The *Offers>Conditions* page lists the conditions currently included in the offer.

3.1   Create

To create a condition, select one of the types from the "Add a condition" dropdown and click Add. A popup will appear which will allow you to define the condition's characteristics. When you're finished editing the condition, click Save.

Note that some condition types can appear only once within an offer – customers, points, day, and time. Others can appear multiple times – products, tenders, and trigger codes.

3.2   And/Or

When multiple product conditions are present within the same offer, they're joined by a Boolean relationship (that is, an "and" or "or") which controls the manner in which Logix considers these conditions to be met.

For instance: An offer might have two product conditions, one that requires an item from Group A and another that requires an item from Group B. If they're linked by an "and", then both of them must be met for the offer to take effect – in other words, anyone receiving the offer must purchase an item from Group A and one from

Group B. However, if the conditions were linked by an "or", then either condition could be met – in other words, buying a Group A item *or* a Group B item would qualify the customer.

By default, Logix links these multiple conditions with the "and" relationship, meaning that they all must be met. Clicking an "and" will change it to an "or".

3.3   Delete

To delete a condition, click the "X" button next to its name in the list.

4   Customer conditions

Customer conditions control who will be eligible to receive the offer. To create a customer condition, select from the list of available groups the one that you want to be the condition (for example, Top Decile Customers). Alternatively, you can select "Any Cardholder", then select a group to exclude. For example, excluding Group X from Any Cardholder makes the offer eligible to everyone except members of Group X.

4.1   Customer group

Please be aware of the following when selecting customer groups for a customer condition:

- "Any Customer" is a special customer group that represents all customers both with and without customer IDs or household IDs.
- "Any Cardholders" is a special customer group that represents all customers who have customer IDs or household IDs. With the exception of "New Cardholders", any other customer group can be excluded from it.
- "New Cardholders" is a special group that represents all customers who have customer IDs but do not yet have customer records. You can select this group, but nothing can be excluded from it.
- As for normal, user-made groups, you can select any of them in any combination or quantity. If you select more than one, Logix will consider the groups to be linked by an "or" Boolean condition. In other words, if you select two groups, A and B, Logix will interpret that to mean that a customer needs to be either in group A or in group B in order to meet the condition.

4.2   Offline Conditions

Ticking the "Customer condition evaluates to true when offline" checkbox indicates for offline transactions, the condition will always be true.

If a customer does not exist in the local database, and the UE is offline to Logix, the customer would be eligible for both "Any Cardholder" offers and offers that have the "Customer condition evaluates to true when offline" option enabled.

5 Product conditions

Product conditions are met when certain items are purchased. For instance, the condition of buying milk might trigger a discount on cereal.

5.1 Product group

To create a product condition, you first must select from the list of available groups the one that you want to be the condition (for example, Paper Products). In order to exclude a product group, you can select one and only one product group to include and then one and only one group to exclude.

Alternatively, you may choose to create an attribute based product group. A description of the attribute based product group builder can be found in section 8.8 of the Logix User Manual. When a previously created product condition is revisited for later editing, the product condition will automatically display either the standard product group selector or the attribute based product group builder based on the previously selected type of product group.

5.2   Value

In the quantity box, input the value necessary to satisfy the condition and select the type of value that it is. The currency and unit of measure that is displayed is determined by what was selected on the offer general page. For instance, if the condition is $20 of paper products, the value type will be an amount (dollars). If it's two pounds of meat, the value type will be weight (pounds).

Ticking the "unique product" checkbox indicates that each item that the customer purchases toward meeting the condition must be different. For instance, if 10 items from a group are required and box is ticked, and the customer purchases 10 of the same item, the condition will not be met.

The "Minimum group purchase" box requires the customer to purchase the defined amount from the selected product group. For example, if $20.00 is the minimum group purchase, all items from the selected product group must total $20.00.

Entering a value into the "Minimum item price" box requires all items purchased from the selected product group to be equaled to at least the amount defined. For instance, if $10.00 is the minimum item price, all items purchased from this product group must be at least $10.00.

5.3   Advanced Options

Clearance Levels are flags used to exclude the offer from being used if any of the following is true:

- **Full Price** -- If there is a clearance item and the offer is a full price offer

- **Not on Clearance** -- If there is a clearance item and the offer does not apply to clearance items

- **Any Clearance Level** -- If there is not clearance item and the offer only applies to clearance items

- **Clearance Levels (1…3)** -- If the offer is looking for a specific clearance level and there is not an item on this clearance level

6   Points conditions

A points condition triggers an offer when a customer accumulates a certain number of points in a particular program.

6.1   Points program

Select the appropriate points program from the list.

To use points as a condition, when a customer condition is set to "Any Customer," a user must first create a points program which has the "Allow non-cardholders to earn/redeem" flag enabled.

(*Programs > Points > Points Program*)

Enabling this flag will allow the program to appear in the list when the customer condition is set to "Any Customer." With this feature, customers can qualify for an offer when they have earned a certain number of points during a transaction without being cardholders.

6.2   Value

Input the quantity of points that must be accumulated in order for the condition to be met.

7   Stored value conditions

A stored value condition triggers an offer when a customer accumulates a certain number of stored value units in a particular program.

7.1   Stored value program

Select the appropriate stored value program from the list.

To use stored value as a condition, when a customer condition is set to "Any Customer," a user must first create a stored value program which has the "Allow non-cardholders to earn/redeem" flag enabled.

(*Programs > Stored Value> Stored Value Program*)

Enabling this flag will allow the program to appear in the list when the customer condition is set to "Any Customer." With this feature, customers can qualify for an offer when they have earned a certain number of stored value units during a transaction without being cardholders.

7.2   General

Input the quantity of stored value units that must be accumulated in order for the condition to be met.

8 Tender conditions

A tender condition is met when a customer pays for items using certain types of tender, such as check, MasterCard, etc., or a certain amount of cash ($10, $25, etc.). The currency that is displayed is determined by what was selected on the offer general page.

8.1 Types

To set a tender type condition, select a tender type from the list. The type you select will appear on the right in the Value area. Tender types can be managed from the *Admin>Configuration>Tender types* screen.

8.2 Value

To set a value for the selected type that must be met to satisfy the condition, enter it into the appropriate value box. To indicate that the condition should allow all forms of tender except for those selected, tick the "use as excluded" checkbox. When you've finished, click Save.

9 Day conditions

A day condition controls when the days of the week during which an offer is available. When you've finished setting the day conditions, click Save. To set a day-based condition, check the boxes next to the days of the week on which the offer should be available.

10 Time conditions

A time condition sets the time(s) of day during which an offer will be active. For instance, a time condition could allow an offer to run during morning and evening rush hours but not in between.

To set a time condition, first enter a start time and an end time into the boxes provided, then click the "Add" button to add it. The time slot you defined will then appear below, along with a button marked with an X which allows you to delete it. You can add as many time slots to the condition as you wish.

Note that all time slots must be contained within a single day. In other words, a condition of 11PM to 2AM cannot be created; it would have to be two conditions, one from 11PM to midnight and the other from midnight to 2AM.

Times can be entered with either 12 Hour or 24 Hour Notation; however, the time condition will always be displayed in 24 Hour Notation on the *Offers>Conditions* page.

11 Instant win conditions

11.1 Store Level Instant Win

An instant win condition gives customers a random chance of being able to redeem an offer, a chance determined by the values set in the condition popup.

Award limit: This field is broken up into two parts. The Unlimited Flag indicates there is unlimited number of awards available for the Instant Win offer. The "Integer" Award Limit indicates the number of times the system will allow the offer to be satisfied per store. Once this number is reached at a store, customers will no longer be able to redeem the offer.

Odds of winning: The odds here are expressed as 1:*x*. Odds of 1:100 mean that one customer out of every 100 will pass the condition.

Calculation: Logix supports two different means of calculating whether any given customer will meet the condition:

- Fixed calculation means that, given odds of 1:100, every hundredth customer will meet the condition.
- Random calculation with the same odds means that one customer out of every 100 will meet the condition, but which is determined randomly.

The Store-Level Instant Win offer condition can coexist with other offer conditions on a single offer. In the case where there are other conditions present in an offer with a Store-Level Instant Win offer condition, all *other* offer conditions must be satisfied before qualifying for the Instant Win Offer.

All reward conditions associated to the Instant Win Offer must also be satisfied for the transaction before it qualifies for the Instant Win Offer.

12 Trigger code conditions

Trigger code conditions require a particular code, represented by a UPC, to be scanned during a transaction in order to meet the condition.

12.1 Code

This is the UPC of the required code. Depending on how options are set in *Admin>Configuration>UE System Settings*, this code may need to be within a particular numeric range, and may need to be unique (i.e., not used in any other offer).

To put in a code, enter it into the input box, either with or without zero-padding. (If without, Logix will automatically save the code with appropriate padding.) You can also select a code from the list, which shows the top 100 unused codes in the defined range.

12.2 Requirement

This determines if the code is required to be presented once per transaction or for each redemption of the offer.

Once per Transaction is a qualifying condition that must be satisfied in order for the offer to be earned for multiple instances. The consumer can receive multiple instances of the offer once the qualifying condition has been satisfied. In an example of a Trigger code, the trigger code **must be presented once** to receive multiple instances of the offer.

Once per Redemption is a consuming condition that must be satisfied for the offer to be earned for a certain amount of instances. The consumer will receive one instance of the offer each time the consuming condition has been satisfied. In an example of a Trigger code, the trigger code **must be presented each time** to receive an instance of the offer.

13 Trackable coupon condition

Trackable coupon condition requires a particular code, to be scanned during a transaction in order to meet the condition.

13.1 Trackable coupon program

To attach a trackable coupon program to an offer, first search and find the corresponding program using the 'Starting with' or 'containing' options. Select the trackable coupon program to attach and click on the Select button which will add it to the list box below the Select/Deselect buttons. Only those trackable coupon programs which are not current associated to another offer will appear in the search. (i.e., The trackable coupon program cannot be used in another offer.)

14 Preference

Preferences are a set of configuration options that a user can customize based on their particular needs and wants. When a customer has a specific preference, described in the preference condition, the condition is met. Some examples of preferences are Birth Month, Favorite Color, Pet Owner, or a customer communication preference. Preferences are maintained in *EPM*.

To create a preference condition, select it from the new condition dropdown on the *Offer>Conditions* page, then select the desired type(s) and click the save button. Multiple preference conditions may be added to an offer.

15 Opt-In Conditions

Opt-In conditions control who will be eligible to opt-in and opt-out of an offer shown on an external customer touch point such as a Retailer's website. To create an Opt-in condition, select the Opt-In Conditions checkbox. Once the checkbox has been selected, the Global Condition drop down will be enabled and will display the Customer Opt-in condition which is required before adding any additional Opt-in Conditions.

15.1 Opt-in

15.1.1 Customer

Choosing "Customer" for the Opt-in Condition will prompt the user to choose an Eligibility Customer Group. This will allow the customers included in the selected Customer Group to be eligible to view and opt into the offer.

Once the Eligibility Customer Condition has been created, a new Customer Condition will be created with a Default Customer Group name ("Offer Name" + Opt-in + Group). Only users that have opted into the offer will be placed in the Default Customer Group.

Eligibility Conditions

Delete	And/Or	Type	Details	Information
Customer conditions				
X		Customer	Best Customers.	

Conditions

Delete	And/Or	Type	Details	Information
Customer conditions				
X		Customer	Best Customers Opt-In Group	

A few significant features of Customer Opt-in Condition are particularly important to note:

- **Excluded Customers:** Customers that are in an excluded group will not be eligible to Opt-in an offer even if they are a part of the Eligible Customer Group.
- **Excluded Customer Groups:** If a Customer Group has been excluded in the Customer Condition, then the Customer Group will not be available to choose when selecting a Customer Group for Eligible Customer Condition and vice versa.
- **Any Cardholder:** Choosing Any Cardholder for the Customer Condition will disable the Opt-in Conditions checkbox. Users are not able to choose Any Cardholder for a Customer condition and add an Opt-in condition.
- **Any Customer:** Choosing Any Customer for the Customer Condition will disable the Opt-in Conditions checkbox. Users are not able to choose Any Customer for a Customer condition and add an Opt-in condition.
- **Existing Customer Conditions:** If a Customer Condition is already created for an offer, when a user adds a Customer Opt-in Condition, Logix will consider the Default Customer Group and the Existing Customer Group to be linked by an "or" Boolean condition. In other words, a customer needs to be either in order to meet the condition.

15.1.2 Points

Choosing "Points" for the Opt-in Condition will prompt the user to choose an Eligible Points Program. This will allow customers who have a specific amount of points in a specific Points program to Opt-in the offer. (i.e., if the Eligible Points Program requires 10 points in Points Program A, then the customer must meet these requirements in order to view and opt into the offer.)

Once the Eligible Points Program has been selected, a new Points Eligibility Condition will be created.

Note: The Customer is not required to have the amount of points defined in the Points Eligibility Condition to satisfy the offer. The Points Eligibility Condition is for Opt-in purposes only.

Eligibility Conditions

Delete	And/Or	Type	Details	Information
Customer conditions				
X		Customer	Best Customers.	
Points conditions				
X		Points	Points Program A	10 points required

15.1.3 Stored Value

Choosing "Stored Value" for the Opt-in Condition will prompt the user to choose an Eligible Stored Value Program. This will allow customers who have a specific amount of points in a specific Stored Value program to Opt-in the offer. (i.e., if the Eligible Stored Value Program requires 10 points in Stored Value Program A, then the customer must meet these requirements in order to view and opt into the offer.)

Stored value program	Value
⦿ Starting with ○ Containing	Value needed to satisfy condition:
Beauty Club	
▼ Select Deselect ▲	

Once the Eligible Stored Value Program has been selected, a new Stored Value Eligibility Condition will be created.
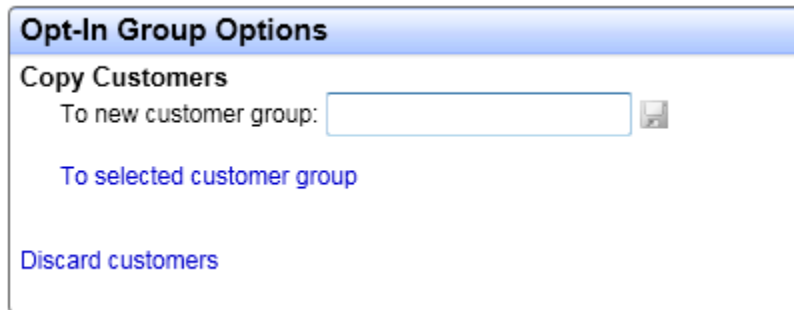
Note: The Customer is not required to have the amount of points defined in the Stored Value Eligibility Condition to satisfy the offer. The Stored Value Eligibility Condition is for Opt-in purposes only.

Eligibility Conditions

Delete	And/Or	Type	Details	Information
Customer conditions				
X		Customer	Best Customers.	
Stored value conditions				
X		Stored value	Beauty Club	10 units required

15.2 Opt-out

To Opt-out of an offer, deselect the Opt-In Condition check box. Subsequently, all customers in the Default Customer Group will be removed. After deselecting the Opt-In Condition checkbox, the user is presented with the Opt-in Group Migration Options dialog box. In the dialog box, choose whether the Customers in the *Default Customer Group (Customers who have opted into the offer)* will be saved to a new customer group, merged into an existing customer group, or discarded.

- **New Customer Group:** Enter a Customer Group name in the provided textbox to copy the customers located in the Default Customer Group into a new Customer Group. This Customer Group will become the Customer Condition for the offer.
- **Existing Customer Group**: Select an existing customer group to copy the customer from the Default Customer Group into an existing Customer Group.
- **Discard Customer Group:** A customer condition must be added to the offer before the customers from the Default Customer Group can be discarded.

To remove the Points and Stored Value Eligibility Condition, simply click the remove button provided.

16 Rewards

Rewards are those things that are granted, or actions that are performed, when an offer's conditions are met. Rewards fall into the following categories: discounts, printed messages, cashier messages, grant membership, points, stored value, pass-through rewards. Each one is described in the following chapters.

The *Offers>Rewards* page lists the rewards currently included in the offer. Click the hyperlink in the "Type" column to see details of each condition.

16.1 Create

To create a reward, select one of the types from the "Add a reward" dropdown and click Add. A popup will appear which will allow you to define the reward's characteristics. When you're finished editing the reward, click "Save".

16.2 Delete

To delete a reward, click the "X" button next to its name in the list.

17 Discount rewards

Discounts are a common reward type that grants an adjustment to the price of an item or basket.

17.1 Product group

First select whether the discount will be item-level (i.e., affecting the purchase of individual items), basket level (i.e., affecting the customer's overall purchase), department-level (i.e., affecting the purchase of items from a particular department), Group level conditional (i.e., affecting the overall group purchase of conditional items) or Item level conditional (i.e., affecting the purchase of each conditional item).

- **Item Level** should be used if the buy items and get items are not the same and item-level discounts are being issued. (i.e. Buy X, Get Y)

- **Basket Level** should be used if the entire basket is being discounted. (i.e., Receive X off entire transaction)

- **Department Level** should be used if items in a department are being discounted. (i.e., 10% off items in Dairy Department)

- **Item Level Conditional** should be used if the items being discounted are the same as the items being used for the product condition and item-level discounts are being issued, with respect to product group and quantity. (i.e., Buy X, Get Y) Item Level Conditional should also be used if there are multiple products within the product condition and item level discounts are being issued. (i.e. Buy A or Buy B)

- **Group Level Conditional** should be used for offers such as "Meal Deals" or "Picnic Basket". (i.e., Buy A, B, & C for $35.00). The discount issued will be distributed across the conditional items.

17.2 Chargeback department

This selector allows you to choose the department against which the discount will be charged. The departments themselves are created and managed through *Admin>Departments*. Selecting a chargeback department allows any discounts that are awarded to be tracked in relation to a specific store department or group.

The defaults are only applied to unsaved discount when the discount type is changed. Saved discounts will always retain their assigned chargeback department until the user specifically changes the chargeback department for the discount.

17.3 Distribution

The settings in the distribution box control the type of discount the customer receives and how it's granted. First, select a discount type from the dropdown:

- Amount off transaction – This distribution will deduct a certain fixed amount from the overall price of the customer's basket. It's available only if no product groups are selected in the product condition selector.
- Percent off transaction – As above, but deducts a certain percentage from the price of the basket.
- Amount off item – Deducts a fixed amount from the price of items in the selected product group or conditional items.
- Percent off item – Deducts a percentage from the price of items in the selected product group or conditional items.
- Amount off by weight/volume – Deducts a fixed amount from each pound or gallon of products in the selected product group or conditional items.
- Price point – Sets a fixed price for each item in the selected product group or conditional items.
- Price point by weight/volume – Sets a fixed price for each pound or gallon of items in the selected product group or conditional items.
- Free item – Items in the selected product group or conditional items are free.
- Special pricing: price point – Items will be sold at a price determined by the order in which the products are purchased. For example, if you set three price points of $0.67, $0.66 and $0.66, then the first product the customer buys will have a price of $0.67 and the second and third will both have a price of $0.66. The radio buttons to the left of each price point indicate the point at which this cycle will repeat should the customer buy more products than there are price points. In this example, if the button next to the first price point was ticked, then the fourth item would be sold for $0.67, the fifth and sixth for $0.66, the seventh for $0.67 again, and so on. If the *third* price point was the repeat point, then all subsequent items would be sold at $0.66.

You will then define the discount's amount and, depending on the type you chose, its limits. Limits allow you to cap the benefit that a customer can receive from a discount. Examples:

- "$1 off Product A, limit 5." This is set up as a fixed-amount item discount with an amount of 1 and an item limit of 5.

- "Get for free a single item worth $5 or less." This is set up as a free item discount with an item limit of 1 and a dollar limit of 5.
- "Spend $50 and get 5% off your basket, spend more and get 10% off." This is set up as a percent-off basket discount with an amount of 5 and an up-to value of 50; and a second percent-off level (see below) with an amount of 10.

In the case of percent off discounts, Logix will allow you to define both an item limit and a dollar amount up to which the discount will be applied. The dollar amount indicated in the "up to" field is used per discount where a single discount amount cannot exceed this value. For instance: using this method you could create a discount which is 10% off up to $25. The item would not receive more than $25.00 for that individual discount.

Logix allows you to define a dollar limit which can be used for both percent off or fixed off discounts. The dollar limit is used as "per instance" where each discount amount is calculated based on each individual instance. For example, if you have an offer where you receive 50% off with a dollar limit of $15 and each item is $10. Then the discount price for each item would equal $5.00. Only 3 items would be discount because the total discount value would equal to $15. If the 4th or 5th items are scanned, they would no longer receive the discount.

Finally, the distribution area has a "Receipt text" input and a "Buy description". This allows you to define a brief message that gets printed on the receipt when the discount is awarded. Input for translations in all available customer facing languages is available for "Receipt text" and "Buy description".

17.4 Advanced options

Flex negative – This option controls whether the amount of a discount will automatically alter ("flex") in order to prevent a total from going negative.

Stored Value – Users can optionally select to store the discount earned, when the offer is awarded, into a predefined stored value program. If this checkbox is enabled, the engine will store the discount earned rather than issue the discount against the item/basket/department. The user will be given a list of stored value programs from which to choose. If the customer condition is set to "Any Customer," only the stored value programs with the "Allow non-cardholders to earn/redeem" checkbox enabled will be visible in the list. If the customer condition is set to Any Cardholder, New Cardholder, or a specific Customer group, all other stored value programs will be visible in the list.

Discount at sales price – Selecting this option allows the unit price of the item to be discounted.

Discount at original price – Selecting this option allows the alternate price of the item to be discounted.

18 Points rewards

A points reward grants a customer a specified number of points in a points program.

18.1 Points program

Select the appropriate points program from the list provided.

To assign a points program as a reward, when a customer condition is set to "Any Customer," a user must first create a points program which has the "Allow non-cardholders to earn/redeem" flag enabled.

(*Programs > Points> Points Program*)

Enabling this flag will allow the program to appear in the list when the customer condition is set to "Any Customer." With this feature, customers can earn/redeem points within a transaction without being a cardholder. However, once the transaction has completed, the points will be discarded.

18.2 Distribution

Enter the number of points that will be awarded. If you want to remove points from the customer's balance, enter a negative value.

If you want to limit the size of points adjustments that can be made for this reward, enter a value in the "maximum adjustment" input box. If this value is set, then points adjustments made through customer inquiry will produce a warning any time they exceed the value (either as an award or a decrement).

Ticking the "Successful delivery required" checkbox requires the reward to be satisfied. Otherwise, if the offer consists of multiple rewards, no other rewards will be given unless the delivery of this reward is successful.

19 Stored value rewards

A stored value reward is similar to a points reward – it grants the customer a certain number of units from a stored value program, each unit of which is associated to a particular value.

19.1 Stored value program

Select the appropriate stored value program from the list provided.

To assign a stored value program as a reward, when a customer condition is set to "Any Customer," a user must first create a stored value program which has the "Allow non-cardholders to earn/redeem" flag enabled.

(*Programs > Stored Value> Stored Value Program*)

Enabling this flag will allow the program to appear in the list when the customer condition is set to "Any Customer." With this feature, customers can earn/redeem stored value units within a transaction without being a cardholder. However, once the transaction has completed, the stored value units will be discarded.

19.2 Distribution

Enter the number of stored value units that will be awarded. If you want to remove stored value from the customer's balance, enter a negative value.

20 Printed message rewards

A printed message is text included on the customer's receipt. Logix allows users to input text for translations in all available customer facing languages.

20.1 Message

This is where you enter the text of the message. Clicking the buttons next to the text area inserts tags into the message text that control the formatting of text, insert lines or graphics, or insert variable data. See the appendix of the main *Logix User Manual* for a list of printed message tags with descriptions of their functions.

Faint vertical rules appear in the background behind the message box – these are just aids to help you count the number of characters in each row. The rules appear after every 10 characters. Note that the number of characters actually appearing on any given line in the final printed version may be affected by style tags (big, wide, etc.), and that the tags themselves won't appear in the final printed version.

Clicking the Preview button will display in a popup window an approximation of what the message will look like when printed on a receipt.

21 Cashier message rewards

A cashier message is a short text message shown on a pole display or other similar display device. Logix allows users to input text for different language translations that are in use by the stores that are associated with the offer.

21.1 Message

Enter a short text message into the two input boxes provided. The two boxes represent the two lines of text common on cashier displays.

If you want the cashier message to be accompanied by an audible beep produced by the terminal, you can set it with the "Beep" dropdown. The cashier message can produce a single beep, a beep that persists until cleared by the cashier, or a beep that persists for a set number of seconds.

The display radio buttons control whether the cashier message is awarded immediately (as soon as all conditions are met), or if it will be held until the end of sale. Choose the one you prefer by clicking the appropriate button.

22 Membership rewards

This type of condition allows you to reward the customer with membership to a particular customer group. This can be useful if you wish to put customers into groups based on their shopping behaviors; for instance, if someone purchases pet supplies you might want to place them into a pet owners group which will receive special pet-related offers.

22.1 Customer group

Select the customer group to which membership should be added and click Save.

23 Gift Card Rewards

This reward type allows the retailer to reward the customer with a gift card loaded with the reward amount of the transaction. Instead of deducting the reward amount from the total amount of purchase, it is loaded in the gift card which can be used for future transactions.

Reward amount calculation would be done very similar to the discount type of reward and awarded as a gift card. Proration is done for all the conditional items responsible for awarding a gift card.

To create a Gift card reward, navigate to Logix > Offer page and select the "Gift card" reward type from the "Add a reward" section.

23.1 Value Type

This setting controls the type of discount the customer receives as a gift card. Following are the discount types that can be selected from the dropdown:

- Fixed amount off – Deducts a fixed amount from the price of items in the selected product group or conditional items.
- Percent off – Deducts a percentage from the price of items in the selected product group or conditional items.

23.2 Proration Type

This setting controls the items to be considered in prorating the discount amount given as gift card. Following are the proration types which can be selected from the dropdown:

- All Conditional Items – The discounted amount given away as gift card will be prorated across all the items belonging to the conditional product group.

  Example:

  Offer: Buy 5 items from product group A, and get 10$ gift card with all conditional items as the proration type.

  Transaction: 8 items from product group A are scanned.

  Observation: Gift card of 10$ is rewarded as the offer condition is met once. And the 10$ gift card amount is prorated across all the 8 items of the conditional product group.

- Minimum Conditional Items – The discounted amount given away as gift card will be prorated only on the conditional items due to which the offer is availed.

  Example:

  Offer: Buy 5 items from product group A, and get 10$ gift card with minimum conditional items as the proration type.

  Transaction: 8 items from product group A are scanned.

  Observation: Gift card of 10$ is rewarded as the offer condition is met once. And the 10$ gift card amount is prorated only across the 5 items of the conditional product group.

23.3 Value

This field is used to specify the amount to be awarded as the gift card.

23.4 Charge back

This selector allows the retailer to choose the department against which the gift card amount can be charged. Departments can be created and managed through *Admin>Departments*. By selecting a chargeback department, retailer can track the gift cards given away in relation to a specific store department or group.

23.5 Data

Details of the gift card like the name of the card, buy description and identifier of the card can be provided using the "Name of Card", "Buy Description" and "Card Identifier" fields respectively. This details are used by the retailer in awarding the gift card.

23.6 Distribution

A Rollup flag is provided in this section which will be used by the retailer. Based on the rollup flag, a single or multiple gift cards would be issued.

24 Pass-Through rewards

Pass-Through rewards send predefined types of data down to the terminal when an offer is redeemed.

24.1 XML Pass-Through

Logix limits the number of XML Pass-Through rewards to one per offer. These messages can be entered in the preferred language by entering text in the appropriate text box.

To create a XML pass-through reward, navigate to Logix > Offer page and select the" XML Pass-Through" reward type from the "Add a reward" section.

In the pop-up that appears, enter information in XML format in the "Data" section of the preferred language box. Logix will not accept information in any formats other than XML for this reward type.
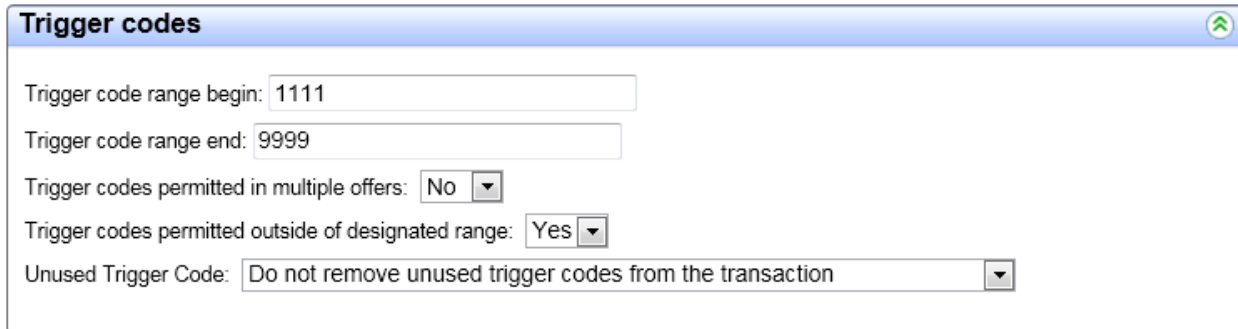

24.1.1 Tags

Tags can be included in the XML pass-through reward by clicking on the relevant tag button. Three types of tags - Trigger Code, Points ID and Stored Value ID are available for every XML pass-through reward.

24.1.1.1 Trigger Code Tags

Clicking on the Trigger code tag button opens a pop-up screen. Click and select the trigger code that is associated with the reward.

The trigger codes which appear on the pop-up depend on the settings in the Admin -> Configuration -> Settings-UE -> Trigger codes section. To define a range of trigger codes, enter a value in the "Trigger code range begin" and the "Trigger code range end" text boxes. If "Trigger codes permitted outside of designated range" is set to "Yes", the user can enter values outside this range in the trigger code tags section.

24.1.1.2 Points ID

The Points ID button is active in one of two cases, when the customer condition for the offer is set to Any Cardholder, New Cardholders, or a specific Customer Group or when the *"Allow non-cardholders to earn/redeem"* is enabled on the Points Program.

To add a points program to the XML format text box, click on the Points ID button in the tags section of the XML Pass-Through Rewards page. Select the appropriate Points Program Name from the list that appears. Note that on selecting the points Program Name from the list box, the Points Program ID number that is associated to that program name is added to the xml message and not the Program name.

24.1.1.3 Stored Value ID

The Stored Value ID button is active in one of two cases, when the customer condition for the offer is set to Any Cardholder, New Cardholders, or a specific Customer Group or when the *"Allow non-cardholders to earn/redeem"* is enabled on the Stored Value Program.

To add a Stored Value ID to the XML format text box, click on the Stored Value ID button in the tags section of the XML Pass through Rewards page. Select the appropriate Stored Value Program Name from the list that appears. Note that on selecting the Stored Value Program Name from the list box, the Stored Value Program ID number that is associated to that program name is added to the xml message and not the Program name.

24.2 Gift With Purchase

Gift with Purchase is a XML Pass through type of Reward that Universal Engine supports. GWP reward is configured in Logix as reward such that when as offer condition is satisfied, a customer will have the option to choose an additional item(s) to purchase from a list of products.

Gift with Purchase pass through message will include the following fields.
• Description
• Product list
• Maximum selection

The engine will not evaluate this reward message to give out any rewards; instead it is will just pass this reward through for the POS/Client's use.

Gift with Purchase will have two parts included in it.

1. GWP reward to be configured in Logix.
2. From UE side, Cashier will get the message that tells him about the list of items that customer can additionally choose to purchase when offer conditions are satisfied so that he can inform the customer about the options.

24.2.1 Create GWP in Logix:

To create a Gift With Purchase reward, navigate to Logix > Offer page and select the "Gift With Purchase" reward type from the "Add a reward" section.

In the pop-up that appears, enter the description of the offer. Logix allows users to input text for different language translations that are in use by the stores that are associated with the offer.

Multiple products can be added in the product list by separating them with a comma delimiter. Maximum selections can be made up to 99.

Offer #1406 Gift with purchase

[Save]

Data

Description: Congratulations!! You won a gift with purchase.

Product List: 12345,12346,12347

Maximum Selections: 1

On Summary page, Gift with Purchase will be appear as:

| Logix | Offers | Customers | Products | Programs | Graphics | Locations | Admin |

| Offers | Templates | | Summary | General | Conditions | Rewards | Channels | Locations | History |

Offer #9: GWPOffer

[Actions ▼]

This offer has been deployed.

General

ID:	9
External ID:	
ROID:	9
Engine:	UE
Vendor coupon code:	
Outbound:	No external interface
Status:	Active
Name:	GWPOffer
Description:	
Folders:	None
Category:	Testing
Priority:	1
Tiers:	1
Impression reporting:	Disabled
Redemption reporting:	Disabled
Created by:	Default User
Buyer:	
Last updated by:	Default User

Mutual exclusion groups

None

Period

Production :	6/18/2014 - 6/30/2014 (13 days)
Testing :	6/18/2014 - 6/30/2014 (13 days)

Limits

Locations

Store groups
1 store from 1 store group:
- GWPStoreGroup (1)

Terminals
- FrenchTerminal

Channels

No channels are currently configured for this offer.

Opt-In Conditions

None

Conditions

Customer conditions
- GWPCustGroup (1)

Product conditions
- GWPprdGroup (1)
  2 required

Rewards

Gift with purchase
- Gift with purchase

Gift with purchase reward can be set up with a tiered offer.

24.3 Purchase With Purchase

Purchase with Purchase is a XML Pass through type of Reward that Universal Engine supports. PWP reward is configured in Logix as reward such that when as offer condition is satisfied, , a customer will have the option to choose an additional item(s) to purchase from a list of products.

Purchase with Purchase pass through message will include the following fields.
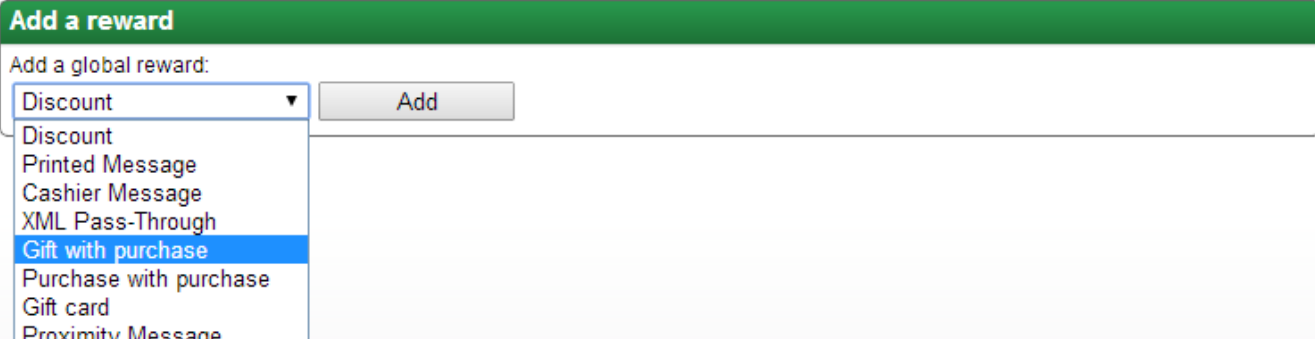• Description
• Product list
• Maximum selection

The engine will not evaluate this reward message to give out any rewards; instead it is will just pass this reward through for the POS/Client's use.

Purchase with Purchase will have two parts included in it.

1. PWP reward to be configured in Logix.

2. From UE side, Cashier will get the message that tells him about the list of items that customer can additionally choose to purchase when offer conditions are satisfied so that he can inform the customer about the options.

24.3.1 Create PWP in Logix

To create a Purchase With Purchase reward, navigate to Logix > Offer page and select the "Purchase With Purchase" reward type from the "Add a reward" section.

In the pop-up that appears, enter the description of the offer. Logix allows users to input text for different language translations that are in use by the stores that are associated with the offer.

Multiple products can be added in the product list by separating them with a comma delimiter. Maximum selections can be made up to 99.

On Summary page, Purchase with Purchase will be appear as:

| Logix | Offers | Customers | Products | Programs | Graphics | Locations | Admin |

Offers | Templates   Summary | General | Conditions | Rewards | Channels | Locations | History

Offer #10: PWP Offer   Actions ▼

This offer has been deployed.

General

ID:	10
External ID:	
ROID:	10
Engine:	UE
Vendor coupon code:	
Outbound:	No external interface
Status:	Active
Name:	PWP Offer
Description:	
Folders:	None
Category:	Testing
Priority:	1
Tiers:	1
Impression reporting:	Disabled
Redemption reporting:	Disabled
Created by:	Default User
Buyer:	
Last updated by:	Default User

Mutual exclusion groups
None

Period

Production :	6/19/2014 - 6/30/2014 (12 days)
Testing :	6/19/2014 - 6/30/2014 (12 days)

Limits

Locations

Store groups
1 store from 1 store group:
- GWPStoreGroup (1)

Terminals
- All UE Terminals

Channels
No channels are currently configured for this offer.

Opt-In Conditions
None

Conditions

Customer conditions
- Any customer

Product conditions
- Any product
  2 required

Rewards

Purchase with purchase
- Purchase with purchase

Purchase with purchase reward can be set up with a tiered offer

24.4 Proximity Message Reward

To create Proximity Message reward, navigate to Logix > Offer page and select the "Proximity Message" reward type from the "Add a reward" section.

Atleast one reward should exist in the offer to add a Proximity Message Reward. Multiple Proximity message rewards can also be created for a single offer.

24.4.1 Message Type

This field is used to configure the type of proximity that can be set for the offer. Following are the types that can be selected by the retailer

- Items – This option is populated in the dropdown only when there is an offer condition based on the number of products to purchase. By selecting this option, customer can see the proximity reward based on the number of items he/she is away in availing an offer.

- Amount – This option is populated in the dropdown only when there is an offer condition based on the amount of products to purchase. By selecting this option, customer can see the proximity reward based on the amount of money he/she is away in availing an offer.
- Points – This option is populated in the dropdown only when there is an offer condition based on the points. By selecting this option, customer can see the proximity reward based on the points he/she is away in availing an offer.

24.4.2 Data

Following are the fields that can be selected by the retailer in the data section.

- # required to earn the offer – This field gives the information of the items/amount/points required to earn this offer. This is a disabled field and is populated from the offer conditions.
- # away from qualifying for offer – This field is used to configure the items/amount/points threshold value from where the proximity reward has to be rewarded. By entering a value in this field and saving the reward, an informative text would be displayed below this field which indicates the threshold value to trigger this reward.

24.4.3 Tags

Tags can be used in creating the proximity message which would be displayed to the customer. "# required" tag should be used in the message which will be further used by the engine to display the appropriate value.

25 Preference as Reward

Preference as reward functionality allows user to set up the business rules in AMS/UE/EPM such that when a consumer purchases certain products in specific quantities over a specific span of time he shall be assigned a specific value for a preference.

Logix provides user an option to set up a reward of type "Preference". When a retailer picks "preference" as a reward, he is allowed to pick the Preferences that have been designated to be shared with the AMS channel and the appropriate values. Only preferences with discrete values are allowed. The following preferences types with discrete values are supported to be set as Preference Reward: **Likert, Boolean and ListBox**.

25.1 Preference Data types allowed as Preference Reward in Logix

- **Boolean** – It assumes values in yes or no. If a particular preference of this type is set for a customer it will have VALUE as TRUE else FALSE.

- **Likert** – It assumes a single value from any of the discrete values on a range of Likert scale i.e. 1 to 5.

- **Listbox** – It allows for multiple values of a preference to be set for a customer.

25.2 Creating an offer with Preference as a reward

User can set preferences as reward form reward section in an offer while creating one. Just make sure you are selecting the right engine while creating such an offer.

Assuming you have created three preferences as described before one each for likert, boolean and listbox in EPM namely 'likert preference', 'boolean prefernce' and 'listbox preference' and multivalue check is enabled for 'listbox preference'.

Create an offer with issuance enabled. Make the offer targeted for at least a specific customer group because until and unless you add a specific customer group in offer conditions (not any customer, any cardholder) 'preference as a reward' won't show in drop down menu on clicking 'Add preference as a reward' on rewards tab. You may enable more than one tier in offer.

Go to rewards tab and select 'Preference' from drop down and click on Add.

Add preferences as reward for all the three preferences (Boolean, likert, Listbox).

Note: Make sure issuance is enabled.

26 Channels

The *Channels* page allows a user to distribute UE offer data to different channels to notify customers of upcoming and/or existing offers.

26.1 Delivery Selections

Users have the option to have offer details distributed via the previous existing Legacy: web/kiosk delivery method or opt to use the channel delivery method.

- Legacy: web/kiosk delivery: Website/Kiosk engine that allows retailers to advertise offers via website and/or kiosk. (Use for installations prior to 5.19 Logix)
  - **Do not display on customer-facing website** – Ticking this checkbox will prevent the offer's details from being presented on a customer-facing website.
  - **Display on web kiosk** – Ticking this checkbox will allow the offer to be shown on in-store kiosks. These kiosks, normally computer stations with touchscreens, are sites at which customers can receive information about the offers they're eligible to receive.

Select either *Legacy: web/kiosk delivery* or *Use Channels* and click the 'save' icon to save your selection. If "*Use channels*" is selected, after saving your selection, you must then configure the channels you wish to use.

26.2 Channels

Channels allow retailers an enhanced way to advertise offers to customers via the Kiosk or Website. Retailers can chooose both channels or specify certain channels to which to send offer data.

26.2.1 Kiosks

- o **Start/End Dates:** Offer data will be advertised on the kiosk during these defined dates.
- o **Kiosk offer description:** Description of the offer details which will be displayed on the Kiosk.
- o **Kiosk offer graphic:** An image can be added to be displayed on the Kiosk.

26.2.2 Point of Sale (POS)

- o **Start/End Dates:** Offer data will be advertised on the POS during these defined dates.
- o **Limits** – Limits control the frequency at which the offer data notifications are made available.
  - ▪ **No Limit**
  - ▪ **Once per transaction** –is computed once per single POS transaction
  - ▪ **Once per offer** – a promotional variable is updated at the end of a POS transaction for this customer or household and is never reset
  - ▪ **Days (Rolling)** – eligibility can be defined by limit, period based on days since last incentive.
- o **Notification**

  Notification are closely related to rewards, but unlike regular rewards that are granted when the offer's conditions are met, notifications may be granted earlier, while a customer is still earning or accumulating to meet the offer's conditions. Printed messages and cashier messages can be granted as notifications.

26.2.3 Website

- o **Start/End Dates:** Offer data will be advertised on the website during these defined dates.
- o **Website offer description:** Description of the offer details which will be displayed on the Website.
- o **Website offer graphic:** An image can be added to be displayed on the Website.

27 Locations

The *Locations* page allows you to select where the UE offer will be available.

27.1 Store groups

To make the offer available to the stores in a particular group, select the group from the "Available" list and move it to the "Selected" list. To make the offer available at all stores, select "All Stores" and move it to the

"Selected" list. When "All Stores" is selected, you can optionally specify a store group to exclude from it by adding it to the "Excluded" list.

27.2 Terminals

In some cases you may want an offer to be available at regular checkouts but not express lanes, or at fuel stations only. Select the terminal types you want from the "Available" list and move them into the "Selected" list. To make the offer available at all terminals, select "All UE terminals" and move it to the "Selected" list. When "All UE Terminals" is selected, you can optionally specify one or more terminals to exclude from it by adding them to the "Excluded" list.

28 History

All activity related to a UE offer is recorded and displayed in the offer's *History* page, ordered to show the most recent actions first. Each entry in the list displays the date and time that the action occurred, the user who performed it, and a brief description of what was done.

29 Appendix:

29.1 Use Cases

29.1.1 GWP Use Cases:

29.1.1.1 Use case 1: GWP before selection of Items

Offer Setup Details
General Reward Limit -- No Limit Condition 5 items required. Reward Gift With Purchase as reward. Product list: UPC code of an item/items or Name of the item/Items. Maximum Selection :1
Transaction Setup Details
Scan 5 items from conditional product group.
Results
List of Gift items will be populated at the end of receipt where user is to pick up an item.

29.1.1.2 Use case 2: GWP after selection of Items

Offer Setup Details
General Reward Limit -- No Limit Condition 5 items required. Reward Gift With Purchase as reward. Product list: UPC code of an item/items or Name of the item/Items with comma.

Maximum Selection :1

Transaction Setup Details
Scan 5 items from conditional product group.
Scan the item which is in product list with "0" unit price.

Results
Items will be given for 0 unit price. Should get the "item [item1, item2] free on item [item3]" message under Gifted item.
List of Gift items will be populated at the end of receipt.

29.1.1.3 Use case 3: GWP after selection of Items in tiers.

Offer Setup Details
General
Reward Limit -- No Limit
Tiers: 4
Condition
2/4/6/8 items required.
Reward
Gift With Purchase as reward.
Product list: UPC code of an item/items or Name of the item/Items with comma.
Maximum Selection :2/4/6/8

Transaction Setup Details
Scan 2 items from conditional product group.
Scan the item which is in product list with "0" unit price.

Results
Items will be given for 0 unit price. Should get the "item [item1, item2] free on item [item3]" message under Gifted item.
List of Gift items will be populated at the end of receipt.
Observations:
Scan 3,4,5,6,7,8 and 9 conditional items with the items which are in product list. Items will be given for 0 unit

price.

29.1.1.4 Use case 4: GWP for Ecommerce users

Offer Setup Details

General

Reward Limit -- No Limit

Condition

5 items required.

Reward

Gift With Purchase as reward.

Product list: UPC code of an item/items or Name of the item/Items with comma.

Maximum Selection :1

Transaction Setup Details

Scan 5 items from conditional product group.

Scan the item which is in product list with "0" unit price.

Results

Items will be given for 0 unit price.

1|15|123,456,789|10|MOTHERSDAY|1234,67892|GWPOfferChoc

Observations:

Before scanning the gifted items, we should get the information of product list.

Note: A conditional item can also be a gift item. Cashier need to scan that item with 0 price

29.1.2 PWP Use Cases:

29.1.2.1 Use case 1: PWP before selection of Items

Offer Setup Details

General

Reward Limit -- No Limit

Condition

5 items required.

Reward

Purchase With Purchase as reward.

Product list: UPC code of an item/items or Name of the item/Items.

Maximum Selection :1

Transaction Setup Details

Scan 5 items from conditional product group.

Results

List of Discounted items will be populated at the end of receipt where customer will pick up an item from the list.

29.1.2.2 Use case 2: PWP after selection of Items

Offer Setup Details

General

Reward Limit -- No Limit

Condition

5 items required.

Reward

Purchase With Purchase as reward. Should get the **item [item1, item2] discounted due to item [item3]** message under discounted item.

Product list: UPC code of an item/items or Name of the item/Items with comma.

Maximum Selection :1

Transaction Setup Details

Scan 5 items from conditional product group.

Scan the item which is in product list with less than the actual price.

Results

Items will be given for discount.

List of Discounted items will be populated at the end of receipt.

29.1.2.3 Use case 3: PWP after selection of Items in tiers.

Offer Setup Details

General

Reward Limit -- No Limit

Tiers: 4

Condition

2/4/6/8 items required.

Reward

Purchase With Purchase as reward.

Product list: UPC code of an item/items or Name of the item/Items with comma.

Maximum Selection :2/4/6/8

Transaction Setup Details

Scan 2 items from conditional product group.

Scan the item which is in product list with less than the actual price.

Results

Items will be given for discount. Should get the **item [item1, item2] discounted due to item [item3]** message under discounted item.

List of Discounted items will be populated at the end of receipt.

Observations:

Scan 3,4,5,6,7,8 and 9 conditional items with the items which are in product list. Items will be given for discount.

29.1.2.4 Use case 4: PWP for Ecommerce users

Offer Setup Details

General

Reward Limit -- No Limit

Condition

5 items required.

Reward

Gift With Purchase as reward.

Product list: UPC code of an item/items or Name of the item/Items with comma.

Maximum Selection :1

Transaction Setup Details

Scan 5 items from conditional product group.

Scan the item which is in product list with less than the actual price.

Results

Items will be given for discount.

e.g 2|17|123,789|12|MOTHERSDAY|1234,67892|PWPOfferDogProd

Observations:

Before scanning the discounted items, we should get the information of product list.

Note: A conditional item can also be a discounted item. Cashier need to scan that item with discounted price(e.g. $1) and then it will be considered as PWP.

29.1.3 Preference as Reward Use Cases:

29.1.3.1 Use Case 1: Rewarding preferences to the customer for the first time.

Offer Setup Details

General

Reward Limit -- No Limit

Condition

2 items required (tier 1).

Reward

Preferences (Likert, Boolean, Listbox) as reward.

Product list: UPC code of an item/items or Name of the item/Items

Transaction Setup Details

Scan 2 items from conditional product group to reward tier1.

Results
Preferences will be rewarded. User may check on the Customer Inquiry's Preferences tab.

29.1.3.2 Use Case 2: Updating preferences of the customer.

Offer Setup Details
General
Reward Limit -- No Limit
Condition
4 items required (tier 2).
Reward
Preferences (Likert, Boolean, ListBox) as reward with different values for tier2.
Product list: UPC code of an item/items or Name of the item/Items

Transaction Setup Details
Scan 4 items from conditional product group to reward tier2.

Results
Preferences will be updated for Likert and Boolean. New values are added for ListBox preference. User may check on the Customer Inquiry's Preferences tab.

29.1.3.3 USE CASE 3: Rewarding the same preferences to the customer.

Offer Setup Details
General
Reward Limit -- No Limit
Condition
4 items required (tier 2).
Reward
Preferences (Likert, Boolean, Listbox) as reward with different values for tier2.
Product list: UPC code of an item/items or Name of the item/Items

Transaction Setup Details

Scan 4 items from conditional product group to reward tier2.

Results

No preferences will be rewarded to the customer. User may check on the Customer Inquiry's Preferences tab.